A REPORT ON THE
NEW BRUNSWICK POTATO INDUSTRY
AND
THE TABLESTOCK MARKET

PREPARED FOR:
NEW BRUNSWICK DEPARTMENT OF AGRICULTURE

PREPARED BY:
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FREDERICTON, N.B.

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A PROFILE OF THE POTATO INDUSTRY IN NEW BRUNSWICK

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EXECUTIVE SUMMARY

THE STATE OF THE NEW BRUNSWICK POTATO INDUSTRY

OVERVIEW

In 1987 the New Brunswick Department of Agriculture commissioned a study of the New Brunswick Potato Industry. This study, conducted by Baseline Market Research Ltd., provided an overview of grower operations, especially in relation to the production of tablestock potatoes, and an overview of current market conditions from the perspective of the growers, shippers, wholesalers, retailers and consumers.

This study involved preliminary interviews with key industry participants, a telephone survey of 244 growers, personal and telephone interviews with shippers, wholesalers and retailers, a telephone survey of 500 household food buyers and eight focus groups conducted in different areas of the province.

GROWER'S STUDY

Some of the information collected through the Grower's Study included the following:

.. New Brunswick has approximately 455 potato growing operations.

.. The per acre yield varies in accordance with the type of potatoes produced (based on estimates from those who grow for only one market):

.. 190 cwt/acre for tablestock varieties
.. 218 cwt/acre for processing varieties
.. 216 cwt/acre for seed varieties

.. Among New Brunswick growers, 50% report producing some varieties for seed; 53% produce for processing; and 50% produce for the tablestock market.

.. Among those who grow varieties for the different markets, approximately 16% sell exclusively to one market - to either the seed, processing, or tablestock.

.. While 50% of all growers plant with an intention to sell on the tablestock market, in the final analysis an average 72% sell to this market, suggesting either unexpected demand for tablestock varieties or a lack of demand in processing and seed.

.. When asked which market they would prefer to serve:

... 31% of growers preferred the seed market
... 36% preferred the processing market
... 16% preferred the tablestock market
... 17% indicated a combination of different markets

.. Among growers with 200 acres or more in production, only 9% indicated a preference to supply the tablestock market.

.. Among all growers, 86% considered the tablestock market as somewhat or very important to their growing operation, and 97% considered it somewhat or very important to the overall industry.

.. When asked about their level of satisfaction with the ways in which the industry functions:

... 65% of growers claimed to be somewhat or very satisfied with the overall system for selling potatoes.

... 67% claimed to be somewhat (38%) or very (29%) dissatisfied with the current prices offered for potatoes.

.. In evaluating the quality of New Brunswick produced potatoes offered to consumers, 17% of the growers considered the quality excellent; 39% considered it good; 28% considered it fair; and 16% considered the quality of potatoes offered to consumers poor. The larger the growing operation, the lower the grower's perceived quality of potatoes offered to the N. B. consumer.

.. When asked to rate the overall quality of potatoes produced in New Brunswick, 87% of all growers rated the quality as excellent or good; and 13% rated the quality as fair or poor. When asked how consumers would rate the New Brunswick grown potato, 50% of growers suggested that N. B. potatoes would receive a fair or poor rating.

.. When looking at the tablestock market, information from growers revealed that:

... 58% of tablestock potatoes grown in New Brunswick are washed, and 25% of tablestock sold in New Brunswick is washed.

... 22% of tablestock potatoes produced in New Brunswick are brushed, and 36% of tablestock sold are brushed.

.. When asked about some issues of interest to the industry:

... 91% of all growers favored the establishment of inspection procedures for potatoes sold within the province. The federal government was selected as the preferred inspection agent by 45% of growers; the provincial government by 33%; the Potato Agency by 10%.

... 58% of all growers favor the establishment of a National Potato Agency; 23% oppose the establishment of such an agency; and 19% have no opinion on the issue.

.. When asked what they considered as the major problem facing potato growers, 35% cited low prices; 24% cited the cost of production (low profit margins); and 13% mentioned overproduction. Among growers, the majority reported that they did not anticipate solutions to the problems facing the industry over the next five years.

SHIPPERS, WHOLESALERS AND RETAILERS

Interviews with shippers revealed the following:

.. Shippers fall into two major groups: those who sell primarily on the U.S. markets, and those who sell primarily within New Brunswick. These shippers differ in their overall volumes, of shipments, types of products and types of packaging.

.. If changes occurred regarding access to U.S. markets, most shippers would prefer to serve other major Canadian markets rather than the New Brunswick market because of market potential in those larger Canadian markets.

.. The majority of shippers favor inspection standards for all products sold within New Brunswick.

.. Among shippers there is a widespread lack of support for the establishment of a National Potato Agency.

.. Those serving the New Brunswick market are generally providing an unwashed product in a paper bag. Those supplying the U.S. market are more likely to supply a washed product (often in a poly bag or intended for a poly bag).

Interviews with wholesalers revealed that:

.. Most have a high degree of dissatisfaction with the New Brunswick product and a high degree of satisfaction with Prince Edward Island product.

.. Wholesalers believed that P.E.I. has established a better supply system: it is generally easier for them to get potatoes from the Island than from New Brunswick shippers.

.. Most wholesalers claim a higher level of consumer satisfaction with P.E.I. potatoes compared to N.B. potatoes.

.. Most wholesalers anticipate a significant increase in their level of involvement in the distribution of potatoes over the next few years.

Interviews with the retailers revealed:

.. A high level of dissatisfaction with the quality and packaging of New Brunswick potatoes.

.. A strong belief that New Brunswick potatoes generated a high level of consumer dissatisfaction.

.. A distribution system based on back-door deliveries from New Brunswick and a central system for deliveries from Prince Edward Island.

.. A need to improve the relationship between retailers and the N. B. potato industry to ensure long-term market access and product support.

.. A belief among many that P.E.I. produces and packages a better product and they will eventually become the market leader.

CONSUMER STUDY

The telephone survey and focus groups provide the basis for the following statements:

.. In general, New Brunswickers remain the consumers of traditional meals; however, some changes are being noted: New Brunswickers are consuming more fish, chicken, salads and vegetables than they were two years ago, and less beef, pork and potatoes.

.. In an average week, potatoes are served at 4.8 of the seven main meals in New Brunswick households, and these potatoes are either boiled or mashed.

.. People in New Brunswick households consume, on average, 9.13 lbs. of potatoes per week compared to a Canadian average of 8.35 lbs per week. Projecting consumption to all households reveals a market demand of 1,068,210 cwt.

.. In New Brunswick 71% of the market reports a constant or reduced level of rice consumption and 80% report a constant or reduced level of pasta consumption.

.. Focus groups revealed the following images of people who prefer potatoes, rice or pasta:

- "Potato people are traditional, heavy, hard-working and average."
- "Rice people are weight-conscious, healthy, energetic and variety-seekers."
- "Pasta people are outgoing and energetic, joyful, adventuresome, or young."

.. The New Brunswick consumer buys, on average, the N.B. potato, but P.E.I.'s share is growing stronger in the major markets of Moncton, Saint John and Fredericton (with a share between 30-35%).

.. The P.E.I. product is perceived to have a better overall appearance, size, quality and shape, while the N.B. product is better in price. Were the prices of the two known to be equal, P.E.I. would gain a larger share of the local market.

.. New Brunswickers buy products primarily in paper packages in 50 lb. (38%), or 10 lb. (20%). The major complaints about packaging cites the inability to see the product being purchased.

.. To improve the share of the New Brunswick market, the consumer will have to receive:

... better quality

... better packaging

... more consistency in size, appearance and overall quality

... better promotion of the local product

CONCLUSIONS

This study provides the basis for the following conclusions:

.. Growers are not optimistic about the future of the industry and the potential for change.

.. Growers and shippers believe that the New Brunswick consumer is not receiving the best product available from N.B. producers.

.. Growers seem most concerned with crop prices and see the National Potato Agency as a possible source for better prices.

.. Most shippers prefer to serve the U.S. market because of better prices and higher volumes.

.. Local market suppliers believe that the New Brunswick consumers are satisfied with the products available.

.. Wholesalers and retailers have the most negative attitudes toward the New Brunswick potato. They claim that N.B. potatoes are the source of customer complaints because of quality, lack of availability, inferior packaging, and lack of consumer demand. However, were the price and quality acceptable, they would buy more.

.. Consumers are not as dissatisfied as others suggest with the product. Local production and lower prices are the major reasons for buying N.B. potatoes.

.. Consumers to tend to see P.E.I. potatoes as better products in terms of appearance, quality and consistency... but the price of N.B. potatoes gives New Brunswick the edge.

.. While Prince Edward Island was involved in a strong promotional effort, New Brunswick was not projecting a quality image. Subsequently, P.E.I. has become the Idaho potato of Canada - a standard for quality. New Brunswick has a long way to go in re-establishing its product image - if the quality and consistency of the product can be assured.

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OVERVIEW

In April, 1987 the provincial Department of Agriculture retained the services of Baseline Market Research Ltd. to develop a comprehensive profile of the potato industry in New Brunswick. This profile, as outlined in the terms of reference, was designed to provide information on growers and growing operations, retailers, wholesalers and shippers involved in the industry and consumers of the product. The major focus of this study was to center on the New Brunswick tablestock market.

This profile of the industry was to be developed through a series of research methods employing the use of secondary research and personal and telephone contacts with a variety of respondents.

The total research effort was developed to accomplish the following, overall objectives:

- to identify opportunities to improve the image of New Brunswick potatoes;
- to identify opportunities to increase the market availability of New Brunswick potatoes;
- to develop opportunities to enhance actual sales of table potatoes.

This report provides a detailed summary of each aspect of the potato industry studied, including the objectives which guided that part of the study, the research methodology employed and the major research findings drawn from each research effort.

The reports on each sector of the potato industry have been designed to be presented on an independent basis or as a collective overview of the entire industry.

This report provides a detailed profile of the New Brunswick growers and growing operations, the results of a survey of wholesalers and retailers, the survey of shippers and the information collected through the study of consumers.

A STUDY OF NEW BRUNSWICK POTATO GROWERS

A PROFILE OF GROWERS AND GROWING OPERATIONS IN THE NEW BRUNSWICK POTATO INDUSTRY

INTRODUCTION

As a part of the comprehensive study of the NB potato industry, BMR completed interviews with 244 potato growers from throughout the province. The following pages provide a summary of the objectives which guided this section of the research, the methodology employed and the information collected through the contact with growers.

RESEARCH OBJECTIVES

The overall objectives which guided this section of the research effort were originally developed from the terms of reference prepared by the Department of Agriculture. The objectives related to the growers study were as follows:

to determine the major factors considered by growers in making the planting decision;

to determine the producer's preferred markets;

to provide a profile of the producer/buyer relationship which includes a summary of the sales through direct marketing, sales through shippers, wholesalers, and retailers along with a profile of the longevity of the producer-buyer relationships;

to determine the level of awareness of consumer preferences and concern for those preferences among producers;

to determine the attitudes of buyers concerning the need for more inspection services at the shipper or retail level;

to determine the overall level of satisfaction with different aspects of the current marketing system; and

to provide a demographic profile of the producers including the size of the farm, total potato acreage, length of involvement in the industry, location and overall business volumes;

Following the initial submission consultation with the advisory committees at the government and firm level and preliminary discussions with growers resulted in additional information needs being developed. These needs were then translated into the following objectives:

to provide the Department with a measure of the growers attitudes concerning the establishment of a national marketing agency, including an assessment of their perceptions concerning the impact of such an agency on the local market conditions;

to provide an assessment of the growers' rating of the services provided by the Department, the federal government and the Potato Agency; and

to provide the Department with the growers' perceptions concerning the quality of potatoes produced in this province, the major problems facing the industry and an assessment of the likelihood of problems being solved over the coming few years.

These objectives provided the framework within which growers were approached.

The following material provides a brief summary of the methodology which provided the foundation for this research.

METHODOLOGY

SAMPLING

To insure a valid sample of the overall population of potato growers in New Brunswick BMR first obtained a listing of all growers from the recently developed agricultural directory for the Atlantic region. Additionally, BMR received a complete listing of all licensed growers from the Potato Agency. The combination of these lists provided the sampling frame for this study.

Because no detailed list was available which provided the actual acreage for any grower, BMR used the expertise of the project advisory team to categorize these growers into large, medium and small operations. This categorization provided the basis for stratification of the sample.

This process resulted in 10% of the growers falling into the large grower category (200 or more acres), 28% in the medium group (76-199 acres), 10% in the small category and 51% not categorized. In total, this produced a listing of 479 individual farming operations in this province (from the two lists and addresses, we we were able to eliminate farming operations with multiple licenses).

- Once the lists were refined, we then selected a total of 314 names from the stratified lists. Of these, 50 were classified as growers in large operations, 100 as growers with medium size operations and 49 as small growers. Of those who were selected, 115 could not be initially classified in terms of the size of their growing operations because of lack of information. They were classified after the data collection process, as evidenced in Table G-4.

Each of the 314 people selected received a letter, in either or both official languages, letting them know about the study and asking for their cooperation, especially given the difficulty of conducting a survey during growing season.

Table G-1 summarizes the results from the letters mailed:

TABLE G-1
SUMMARY OF GROWER CONTACT
N=314 LETTERS

ACTION	NUMBER	PROPORTION
DUPLICATE FARM CONTACTS (MORE THAN ONE PER FARM)	7	2%
NO LONGER IN FARMING (CONTACTED BY INTERVIEWER)	23	8%
TOTAL ADJUSTED SAMPLE	284	
COMPLETED INTERVIEWS	244	86%
UNABLE TO CONTACT	24	8%
REFUSALS	16	6%

This material suggests a high level of interest in this study. One should recall that this study was completed at the onset of the planting season and yet interviews were completed with 86% of the growers actually contacted.

Within the different categories the following overall response rates were found:

TABLE G-2
RESPONSE RATE BY
SIZE OF GROWING OPERATION

SIZE OF OPERATION	LETTERS MAILED	INTERVIEWS COMPLETED
SMALL	49	34
MEDIUM	100	85
LARGE	50	40
UNKNOWN*	115	85
	314	244

*Classified after data collection (see Table G-4)

QUESTIONNAIRE DESIGN

The questionnaire designed for this telephone survey of growers was developed in accord with the research objectives. A copy of the growers survey is included in Appendix A. The questionnaire was available in both official languages; the language of the interview was determined by the grower.

DATA COLLECTION

BMR proposed a telephone survey because this study needed to be completed quickly, because of the difficulty in reaching each potential participant and because of the overall cost factor.

All interviews were conducted by BMR's bilingual interviewing staff through the central facility in Fredericton. On average, a minimum of four attempts were made to contact each grower selected for this survey.

The growers did not seem to have any difficulty in completing the survey. Of the 244 interviews completed, the average length of interview was 26.05 minutes. The interviews ranged from 13 minutes to 55 minutes.

Among those contacted, 54 growers chose to complete the interview in French.

DATA ANALYSIS

All data was edited, coded and computerized by BMR staff. The data will be available on PC disk until June, 1988 should additional analysis be necessary.

Analysis was completed using the SPSS package. A complete copy of all frequencies and crosstabulations have been made available to departmental staff for further review.

The following sections summarize the information collected about the New Brunswick potato grower as a result of this research project.

RESEARCH FINDINGS

INTRODUCTION

In this research effort BMR contacted approximately 50% of all growing operations in this province and given the sampling procedures used, BMR concludes that the data collected from this survey is applicable to the industry as a whole. The basis for this statement will be noted as the information collected from this study is compared to existing material of the population as a whole.

POTATO GROWING OPERATIONS IN NEW BRUNSWICK

As noted earlier, this research effort initially identified 479 growing operations in this province. Based on initial mail-out to 314 of those operations, 23 growers reported that they were no longer involved in growing. This would suggest that approximately 5% of the listed operations are no longer growing thus suggesting that there are 455 potato growing operations in New Brunswick. Of those, based on survey data, 41% involve more than one grower (usually another member of the family) who may, or may not have a license from the Potato Agency.

The following narrative provides a summary of the overall information collected about New Brunswick potato growing operations.

SIZE AND LOCATION OF OPERATIONS

Table G-3 provides a summary of the location of farms involved in this survey:

TABLE G-3
COUNTY OF GROWING OPERATIONS

COUNTY	PERCENT OF GROWERS
Victoria	43%
Carleton	41%
Restigouche	5%
Queens	3%
Kent	2%
Gloucester	2%
Westmoreland, York, Madawaska, Sudbury Northumberland,	4%
	100%

This distribution is consistent with the number of growing operations listed in the regional directory.

Table G-4 summarizes the information collected about the size of growing operations in this province:

TABLE G-4
SIZE OF GROWING OPERATIONS: PLANTED ACREAGE

ACREAGE	PERCENT OF OPERATIONS	NUMBER OF OPERATIONS
75 ACRES OR LESS	39%	90
76-199 ACRES	42%	99
200 OR MORE ACRES	19%	45
	100%	234

Ten growers did choose not provide an answer when asked about the overall number of acres.

The average number of planted acreage on a potato farm in New Brunswick is 128.99.

The growers in this survey produced a total of 4,147,512 barrels of potatoes (6,843,394 cwt), approximately 53% of the total potato output. These growers have approximately 62% of the total production acreage.

This study collected information on both the overall number of barrels produced in 1986 and the average production per acre; this information is summarized in the following table.

TABLE G-5
BARRELS OF POTATOES PRODUCED ON POTATO FARMS IN NEW BRUNSWICK

NUMBER OF BARRELS	PERCENT OF OPERATIONS
less than 10,000	34%
10-15,999	24%
16-24,000	20%
25,000 +	22%
	100%

On average, a potato farm in this province is producing about 131 barrels per acre. That average does vary within groups of seed, processing and tablestock producers. For example, growers who produce tablestock exclusively, average about 115 barrels per acre.

Growers who produce processing exclusively average approximately 132 barrels per acre and those who produce seed exclusively average about 131 barrels per acre.

Among New Brunswick growers, the average amount of planted land that is owned, as opposed to rented, is 95% percent.

Twenty-nine percent of the growers in this survey reported that their total planted acreage had increased over the past 5 years, 20% reported that their total planted acreage had decreased and 51% reported that the amount of acreage planted had remained constant.

The average decrease in acreage among those involved was 45 acres and the average increase in acreage over the past 5 years was 54 acres. This is consistent with the relative stability of potato acreage in this province over the past 5 years.

In projecting over the next 5 years, 17% of the growers expect to decrease the size of their operations, 16% expect to increase and 67% expect to remain at the same level.

Among those who expect to increase the size of their operations, the average projected increase is approximately 50 acres. The average projected decrease in acreage is approximately 40 acres. These indicators suggest no significant change in the acreage planted over the next five years.

Growers in this study reported that they had an average cash cost of $936.13 per acre and an average total cost, including depreciation, of $1,158.93.

When asked about the business records for their growing operations, 43% of the growers indicated that they personally kept the records, 28% indicated that another family member was responsible, 18% had accountants and 11% reported a combination of people involved in the record keeping. Surprisingly, the person responsible for the record keeping does not appear to vary with the size of the growing operation. Only 15% of the growers reported that their business records were computerized.

Seventy percent of the growers in this study were involved in some other type of agriculture. Fifty-two percent were involved in growing other crops, 15% have livestock and 33% had both crops and livestock.

Statistically, the smaller the potato growing operation the greater the likelihood the respondent will be involved in other types of agriculture.

On average, 40% of the grower's crop is sold by December 31st, with 81% sold by April 30th. Thirty-four percent of growers had their entire crop sold by April 30th. Within groupings of the different types of producers, those who sold for processing exclusively had close to 70% of their crop sold by

December 31st, while those selling tablestock exclusively had sold, on average, 56% of their crop. Tablestock producers, on average, reported approximately 15% of their total crop on hand as of April 30th, while seed and processors reported having less than 8% in storage.

PRODUCERS FOR THE DIFFERENT MARKETS

OVERVIEW

Among all growers in this province, 50% plant some of their potatoes to sell for seed, 53% of all producers plant some proportion of their crop for the processing market and 50% also plant some proportion of their crop specifically for the tablestock market.

Among those who plant for the seed market, 18% sell 100% of their potatoes as seed. On average, however, those who produce some of their crop for the seed market actually sell about 51% of their products for use as seed.

Among those who plant for the processing markets, 18% actually sell 100% of their crop to processors. On average, those who produce for the processing market actually sell about 61% of their crop to a processor.

Among those who plant for the tablestock market, about 17% sell 100% of their crop as tablestock. On average, tablestock sales constitute an average of 51% of total crop sales among those involved in that market.

Based on this information one could project that a total of 16% of New Brunswick growers sell exclusively to one market. This is based on a projection from the sample information to the total number of operations. This could be further refined to suggest that 227 (50% of 455 growers) actually plant some acreage for the seed market and that 41 growers in this province produce only for the seed market (18% of 227). Given that the same relative percentages of growers produce for the processing and tablestock markets, we would also expect to find about 41 growers who grow for the tablestock market exclusively and 41 growers who produce exclusively for the processing market.

Differences do exist among the growers producing for the different markets. These differences will be noted in the following sections on each type of producer.

THE SEED MARKET

As noted, 50% of the growers in this province plant at least a portion of their crop for sale as seed. The following material was collected through information provided by those 122 growers involved in this survey.

Table G-6 summarizes the planting patterns of provincial seed growers:

TABLE G-6
VARIETIES USED FOR SEED PRODUCTION

VARIETY	PROPORTION OF FARMS PLANTING
Russets (all)	60%
Shepody	40%
Superior	29%
Kennebec	27%
Red Pontiac	13%
Atlantic	8%
Chieftan	6%
Other Varieties	12%

The proportions refer to the percentage of growers actually planting these varieties, not to the overall acreage produced. The first 4 varieties mentioned were coded for this study and thus this Table represents the combined total of all mentions.

Regardless of variety, the primary reason cited for planting a particular variety was that of market demand. It was on a third or fourth mention that some other reason for planting was actually expressed.

Table G-7 demonstrates the overall percentages of crops which are sold by growers for use as seed.

TABLE G-7
PROPORTION OF TOTAL CROP SOLD FOR SEED POTATO MARKET

PERCENT OF CROP SOLD AS SEED	PERCENT OF GROWERS
25% OR LESS	34%
26-50%	19%
51-75%	19%
76-100%	28%
	100%

When growers sell their seed potatoes they use the distribution channels summarized in Table G-8.

TABLE G-8
DISTRIBUTION CHANNELS FOR SEED POTATOES

CHANNEL USED	PERCENT OF GROWERS
Only through shippers	22%
Only through brokers	11%
Directly to end users	43%
Combination of channels	24%
	100%

Among those who sell seed potatoes, 58% sell at least a part of their output in New Brunswick. Among those, 39% sell exclusively within New Brunswick. On average, about 36% of the seed produced in New Brunswick is sold outside the province.

Thirty-eight percent of those who grow for the seed market sell their product in other Canadian provinces and, on average, they sell about 41% of their output to those markets.

Approximately 28% of those who plant for the seed market report that they sell their seed in the U.S. market and, on average, they sell about 32% of their total output to U.S. buyers.

Fifteen of the 122 growers planting for the seed potato market report that they sell seed in offshore markets. Among this group approximately 26% of their seed potatoes are sold offshore.

Table G-9 provides an overview of the grower's level of satisfaction with the prices they receive for seed potatoes:

TABLE G-9
LEVEL OF GROWER SATISFACTION WITH PRICES FOR SEED POTATOES

LEVEL OF SATISFACTION	PERCENT OF GROWERS
Very Satisfied	8%
Somewhat Satisfied	38%
Somewhat Dissatisfied	34%
Very Dissatisfied	20%
	100%

Each seed grower was asked what was the major problem they encountered in trying to sell the seed potatoes they produced. Eighty-six percent of those who mentioned anything cited overproduction or low prices as the major problem.

THE PROCESSING MARKET

Fifty three percent of the growers in this province plant at least a portion of their crop as processing potatoes. The following material was collected through information provided by those 129 growers involved in this survey.

Table G-10 summarizes the planting patterns of provincial growers for the processing markets:

TABLE G-10
VARIETIES USED FOR PROCESSING PRODUCTION

VARIETY	PROPORTION OF FARMS PLANTING
Russets	85%
Shepody	65%
Atlantic	7%
Superior	5%
Kennebec	3%
Norchip	3%
Manona	2%
Jemseg	2%
Bellisle	1%

The proportions refer to the percentage of growers actually planting these varieties, not to the overall acreage produced. The first 4 varieties mentioned were coded for this study and thus this Table represents the combined total of all mentions.

Regardless of variety, the primary reason cited for planting a particular variety was that of market demand.

The following table demonstrates the overall percentages of a grower's total crop which is sold by growers for processing potatoes.

TABLE G-11
PROPORTION OF TOTAL CROP SOLD FOR PROCESSING POTATO MARKET

PERCENT OF CROP SOLD FOR PROCESSING	PERCENT OF GROWERS
25% OR LESS	18%
26-50%	23%
51-75%	23%
76-100%	36%
	100%

Among those who sell processing potatoes, all but two growers sell at least part of their processing potatoes in New Brunswick; and, on average, these growers sell about 96% of their crop to N.B. processors. Ninety three percent of growers of processing potatoes sell exclusively on the provincial processing market.

Five percent of those who grow for the processing market sell some of their product in other Canadian provinces and, on average, they sell about 31% of their processing output to those markets.

Approximately 5% of those who plant for the processing market report that they sell some of their processing potatoes in the U.S. market and, on average, they sell about 47% of their total processing output to U.S. buyers.

Table G-12 provides an overview of the growers level of satisfaction with the prices they receive for processing potatoes:

TABLE G-12
LEVEL OF GROWER SATISFACTION WITH PRICES FOR PROCESSING POTATOES

LEVEL OF SATISFACTION	PERCENT OF GROWERS
Very Satisfied	2%
Somewhat Satisfied	48%
Somewhat Dissatisfied	35%
Very Dissatisfied	15%
	100%

Each grower of processing potatoes was asked what they thought was the major problem they encountered in trying to sell the processing potatoes they produced. Of those growers who mentioned anything 51% cited color or the grading as the major problem, 25% mentioned price and 11% mentioned a lack of markets for their processing potatoes.

THE TABLESTOCK MARKET

Fifty percent of the growers in this province plant at least a portion of their crop for tablestock market; however, 72% of New Brunswick farmers sold at least part of their crop for tablestock. The differences between planned and actual sales in the tablestock market suggest that this market is served, in part, with products originally intended for other markets.

The following material was collected through information provided by those 175 growers involved in this survey.

Table G-13 summarizes the planting patterns of provincial tablestock growers:

TABLE G-13
VARIETIES USED FOR TABLESTOCK PRODUCTION

VARIETY	PROPORTION OF FARMS PLANTING
Russets	71%
Superior	39%
Kennebecs	12%
Shepody	11%
Katahdin	5%
Jemseg	4%
Green Mountain	3%
Keswick	3%
Other Varieties	11%

The proportions refer to the percentage of growers actually selling these varieties, not to the overall acreage produced.

Regardless of variety, the primary reason cited for planting a particular variety was that of market demand. The second most common mention was that the variety could be sold for other markets as well; that is, it could be sold as tablestock or for the processing or seed markets. The fact that it was an early variety was also mentioned by a number of growers as a reason for planting.

The following table demonstrates the overall percentages of a grower's total crop which is sold by growers for tablestock potato.

TABLE G-14
PROPORTION OF TOTAL CROP SOLD FOR TABLESTOCK MARKET

PERCENT OF CROP SOLD FOR TABLESTOCK	PERCENT OF GROWERS
25% OR LESS	30%
26-50%	24%
51-75%	16%
76-100%	30%
	100%

When growers sell their tablestock potatoes they sell to the following buyers:

TABLE G-15
BUYERS OF TABLESTOCK POTATOES

BUYERS USED	PERCENT OF GROWERS
Shippers	77%
Retailers	28%
Wholesalers	20%
Directly to consumers	20%

As noted in Table G-15, 77% sell tablestock potatoes to shippers; and, of these, 76% sell all of their tablestock to New Brunswick based shippers. Among those who sell tablestock to shippers, an average of 91% of their tablestock crop is sold through this channel.

Of those growers who sell tablestock to shippers 45% pack their own and 55% sell to shippers in bulk. Those growers who pack their own sell to shippers in the following packages:

TABLE G-16
TYPE OF PACKAGING USED WHEN SELLING TO SHIPPERS

TYPE OF PACKAGE	PERCENT SELLING
5 LB POLY BAGS	14%
10 LB POLY BAGS	19%
5 LB PAPER BAGS	13%
10 LB PAPER BAGS	36%
50 LB PAPER BAGS	93%
COUNT BOXES	36%
OTHER*	53%

*The other mentions consisted largely of 20 lb. and 100 lb. bags.

When asked about their relationship with the shippers 25% stated that they been dealing with a variety of shippers over the past few years, the remaining 75% have been dealing with only a few shippers. Most (82%) have been dealing with the same shippers for 3 years or more. Growers who sold to shippers were asked about the prices they received; Table G-17 indicates their level of satisfaction with these prices.

TABLE G-17
GROWERS LEVEL OF SATISFACTION WITH PRICES RECEIVED FROM SHIPPERS

LEVEL OF SATISFACTION	PERCENT OF GROWERS
Very satisfied	9%
Somewhat satisfied	61%
Not very satisfied	--
Very dissatisfied	30%
	100%

Table G-18 demonstrates growers satisfaction with their business relationship with shippers.

TABLE G-18
LEVEL OF SATISFACTION OF BUSINESS RELATIONSHIP WITH SHIPPERS

LEVEL OF SATISFACTION	PERCENT OF GROWERS
Excellent	8%
Good	72%
Fair	17%
Poor	3%
	100%

Those who said that they had a fair or poor business relationship were asked why they believed this was so. The most common mentions were that of low price (35%), followed by grading problems (11%) and collection of payment (11%). The remaining growers mentioned a variety of individual difficulties with the relationship.

As noted 20% of growers selling tablestock sell to wholesalers. On average, of these growers, 42% of their tablestock is sold to wholesalers.

Of those growers who sell tablestock to wholesalers 89% pack their own, 9% sell in bulk and 3% sell to wholesalers in both packaged and bulk form. Those growers who pack some or all of their own sell to wholesalers in the following packages:

TABLE G-19
TYPE OF PACKAGING USED WHEN SELLING TO WHOLESALERS

TYPE OF PACKAGE	PERCENT SELLING
5 LB POLY BAGS	31%
10 LB POLY BAGS	34%
5 LB PAPER BAGS	47%
10 LB PAPER BAGS	72%
50 LB PAPER BAGS	84%
COUNT BOXES	19%
OTHER PACKAGING*	58%

*Other packaging mentioned was largely 20 lb. paper bags.

When asked about their relationship with the wholesalers 82% have been dealing with the same wholesalers for 3 years or more. Growers who sold to wholesalers were asked about the prices they received; Table G-20 shows their level of satisfaction with these prices.

TABLE G-20
GROWERS LEVEL OF SATISFACTION WITH PRICES RECEIVED FROM WHOLESALERS

LEVEL OF SATISFACTION	PERCENT OF GROWERS
Very satisfied	6%
Somewhat satisfied	72%
Not very satisfied	11%
Very dissatisfied	11%
	100%

Table G-21 indicates the grower's satisfaction of their business relationship with wholesalers.

TABLE G-21
LEVEL OF SATISFACTION OF BUSINESS RELATIONSHIP WITH WHOLESALERS

LEVEL OF SATISFACTION	PERCENT OF GROWERS
Excellent	15%
Good	79%
Fair	--
Poor	6%
	100%

As noted in Table G-15, 28% of growers selling tablestock sell directly to retailers. On average 53% of their tablestock potatoes are sold directly to retailers. Of those selling to retailers 22% sell all of their tablestock potatoes directly to this market (28 growers).

Those growers who sell directly to retailers sell in the following type of packages:

TABLE G-22
TYPE OF PACKAGING USED WHEN SELLING TO RETAILERS

TYPE OF PACKAGE	PERCENT SELLING
5 LB POLY BAGS	16%
10 LB POLY BAGS	22%
5 LB PAPER BAGS	46%
10 LB PAPER BAGS	90%
50 LB PAPER BAGS	88%
COUNT BOXES	12%
OTHER PACKAGING*	64%

*Other packaging mentions were largely 20 lb. paper bags.

When asked about their relationship with the retailers 44% stated that they have been dealing with a variety of retailers over the past few years, the remaining 56% have been dealing with only a few retailers. Most (92%) have been dealing with the same retailers for 3 years or more. Growers who sold to retailers were asked about the prices they received; Table G-23 shows their level of satisfaction with these prices.

TABLE G-23
GROWERS LEVEL OF SATISFACTION WITH PRICES RECEIVED FROM RETAILERS

LEVEL OF SATISFACTION	PERCENT OF GROWERS
Very satisfied	20%
Somewhat satisfied	54%
Not very satisfied	18%
Very dissatisfied	8%
	100%

Table G-24 indicates growers satisfaction with their business relationship with retailers.

TABLE G-24
LEVEL OF SATISFACTION OF BUSINESS RELATIONSHIP WITH RETAILERS

LEVEL OF SATISFACTION	PERCENT OF GROWERS
Excellent	22%
Good	72%
Fair	4%
Poor	2%
	100%

Table G-15 indicates that 20% of growers selling tablestock sell directly to consumers. On average 16% of their tablestock potatoes are sold directly to consumers.

Those selling any of their potatoes for tablestock were asked what percent of their tablestock went through a washline which is shown in the following table:

TABLE G-25
PERCENT OF TABLESTOCK THAT ARE WASHED

PERCENT OF TABLESTOCK	PERCENT OF GROWERS
NONE	32%
25% OR LESS	15%
26%-50%	12%
51%-75%	4%
76%-100%	37%
	100%

The 175 growers in this survey sold at least 1,199,616.43 barrels of tablestock. Of those, 689,964.44 barrels (58%) went through a washline. Of those potatoes which went through a washline, 185,536 barrels or 27% were rejected or graded out.

Of those potatoes sold on the New Brunswick market, 25% are washed, and of those tablestock potatoes sold on the United States market, 59% are washed.

Tables G-26 summarizes the responses received from growers concerning the amounts graded out after the washline.

TABLE G-26
PERCENT OF TABLESTOCK GRADED OUT BY WASHLINE

PERCENT GRADED OUT	PERCENT OF GROWERS
NONE	6%
20% OR LESS	11%
21-30%	35%
31-40%	31%
MORE THAN 40%	17%
	100%

On average 32% of the potatoes are graded out after the washline operation.

Table G-27 shows the percentage of the grower's tablestock that is brushed.

TABLE G-27
PERCENT OF TABLESTOCK THAT IS BRUSHED

PERCENT OF TABLESTOCK	PERCENT OF GROWERS
NONE	62%
25% OR LESS	10%
26%-50%	9%
51%-75%	3%
76%-100%	16%
	100%

In this study, a total of 260,319 barrels (22% of the total tablestock) were brushed. Of those potatoes that were brushed, 41,717 barrels or 16% were rejected or graded out. An average of 18% of each growers output was graded out through brushing.

Of those potatoes sold on the New Brunswick market, 36% are brushed, and of those tablestock potatoes sold on the United States market, 19% are brushed.

Growers were then asked what percent of their crop was graded out after brushing which is shown in Table G-28.

TABLE G-28
PERCENT OF TABLESTOCK GRADED OUT BY BRUSHING

PERCENT GRADED OUT	PERCENT OF GROWERS
NONE	15%
20% OR LESS	51%
21-30%	22%
MORE THAN 30%	17%

On average 22% of the potatoes are graded out by brushing.

Those who marketed some portion of their tablestock potatoes to a wholesaler, a retailer or directly to consumers, were asked about the areas to which they sold their potatoes. The following Table summarizes the information collected:

TABLE G-29
PERCENT OF GROWER-MARKETED TABLESTOCK SALES BY GEOGRAPHICAL AREA

PERCENT SOLD	IN N.B. (N=57)	ONT. (N=15)	QUEBEC (N=18)	OTHER PROV. (N=10)	U.S. (N=27)	OFFSHORE (N=3)
25% OR LESS	28%	100%	61%	70%	11%	100%
26-50%	4%	--	17%	20%	19%	--
51-75%	5%	--	16%	--	14%	--
MORE THAN 75%	63%	--	6%	10%	56%	--
	100%	100%	100%	100%	100%	100%

As an interpretation from Table G-29 one can say that of the 27 growers marketing their tablestock to the United States market, 56% are selling more than 75% of their tablestock in the United States.

THE PREFERRED MARKETS

Each grower in this survey was asked to indicate the market or markets to which they would most prefer to sell their potatoes. Table G-30 presents a summary of the indicated preferences.

TABLE G-30
MARKETS PREFERRED BY NEW BRUNSWICK PRODUCERS

MARKET	PROPORTION
Seed Market	31%
Processing Market	36%
Tablestock Market	16%
Combination of Markets	17%
	100%

Analysis of the data revealed the fact that opinions on the preferred markets differed in relation to the overall size of the growing operation. This difference is demonstrated in Table G-31.

TABLE G-31
MARKETS PREFERRED
BY SIZE OF OPERATION

MARKET PREFERRED	75 ACRES OR LESS	76-199	200+
Seed Market	28%	31%	34%
Processing	26%	42%	41%
Tablestock	28%	11%	9%
Combination	18%	16%	16%
	100%	100%	100%

The primary difference evidenced in Table G-31 is the lack of interest in the tablestock market among the medium and large growers in this province.

When asked why they would prefer to sell to the seed market the most commonly cited reason was the different grading which produced a lower level of loss. Others cited the fact that they were most experienced in this area or that they received a better price for their products in this market.

Those who preferred to serve the processing market indicated that this was so because of the lack of need for storage of their potatoes, the security available through a contract arrangement, the difference in grading from the tablestock market or the fact that serving this market was less labour intensive.

Those who indicated a preference for the tablestock market cited their experience in that market as the primary factor in their choice along with the observation that they could make more money on this market.

When asked what changes other than the actual prices received for their potatoes they might suggest about the ways in which New Brunswick potatoes are marketed, 20% of the growers in this study cited the need for a more stable price for the industry, 15% cited the need for inspection standards and better grading for the local tablestock markets, 10% cited the need for the development of new markets and 9% mentioned the need for production quotas. Other mentions included the development of new washlines, promotion, efforts to address the border problems, collection of revenues and the need for more cooperation and coordination within the system. These responses indicate the first item that comes to mind when growers are asked about problems they are facing on a daily basis. Some of these issues are explored in more detail in other sections of this report.

To conclude the growers study, each participant was asked a series of questions concerning the industry as a whole. The following sections provide a summary of the information collected.

GROWERS VIEWS ON THE INDUSTRY

THE TABLESTOCK MARKET

Because of its importance to the industry as a whole, and because it was of special interest to the sponsors of this study, several questions were asked about the tablestock market.

Each participant was asked to rate the importance of the tablestock market to their individual farming operation. Table G-32 summarizes the importance of the tablestock industry to individual farmers.

TABLE G-32
GROWERS PERCEPTIONS CONCERNING THE IMPORTANCE OF THE TABLESTOCK MARKET TO INDIVIDUAL FARMERS

LEVEL OF IMPORTANCE	PROPORTION
Very Important	63%
Somewhat Important	23%
Not Very Important	11%
Not At All Important	3%
	100%

This question was followed by an inquiry concerning the importance of the tablestock market to the potato industry.

Table G-33 summarizes growers perceptions on that issue:

TABLE G-33
GROWERS PERCEPTIONS CONCERNING THE IMPORTANCE OF THE TABLESTOCK MARKET TO THE POTATO INDUSTRY

LEVEL OF IMPORTANCE	PROPORTION
Very Important	80%
Somewhat Important	17%
Not Very Important	2%
Not At All Important	1%
	100%

No significant differences were found among growers with different size operations.

GROWERS SATISFACTION WITH CURRENT CONDITIONS

Each grower was asked about their current level of satisfaction with the overall system for selling their products. The following tables summarize growers views.

TABLE G-34
GROWERS LEVEL OF SATISFACTION WITH WAYS CURRENTLY AVAILABLE FOR SELLING POTATOES

LEVEL OF SATISFACTION	PROPORTION
Very Satisfied	14%
Somewhat Satisfied	53%
Somewhat Dissatisfied	24%
Very Dissatisfied	9%
	100%

Those who were somewhat or very dissatisfied with the current ways in which to sell potatoes were more likely to have less than 20,000 barrels of output per year; however, these differences were not statistically significant.

Table G-35 summarizes the growers level of satisfaction with the prices currently offered in the market place for their potatoes.

TABLE G-35
GROWERS SATISFACTION WITH CURRENT PRICING LEVELS

LEVEL OF SATISFACTION	PROPORTION
Very Satisfied	3%
Somewhat Satisfied	30%
Somewhat Dissatisfied	38%
Very Dissatisfied	29%
	100%

The level of dissatisfaction was universal with no subgroup differences.

THE CONSUMER MARKET

Each grower was asked for his assessment of the importance of consumers' taste or preferences to his operation and to the industry as a whole. The following Tables summarize growers responses.

TABLE G-36
GROWERS PERCEPTIONS CONCERNING THE IMPORTANCE OF CONSUMER PREFERENCE TO MOST GROWERS

LEVEL OF IMPORTANCE	PROPORTION
Very Important	75%
Somewhat Important	18%
Not Very Important	7%
	100%

No difference in opinion was found among growers in different size operations.

TABLE G-37
GROWERS PERCEPTIONS CONCERNING THE IMPORTANCE OF CONSUMER PREFERENCE TO RESPONDENT'S PLANTING DECISIONS

LEVEL OF IMPORTANCE	PROPORTION
Very Important	77%
Somewhat Important	16%
Not Very Important	7%
	100%

These Tables demonstrate that the industry as a whole tends to give some consideration to the potential importance of the consumer.

The following Table summarizes the growers views concerning their awareness of consumer attitudes.

TABLE G-38
GROWER'S LEVEL OF AWARENESS OF CONSUMER ATTITUDES

LEVEL OF AWARENESS	PROPORTION
Very Aware	40%
Somewhat Aware	43%
Not Very Aware	17%
	100%

While no significant subgroup differences can be noted, one should observe that over 70% of growers indicate the importance of consumer attitudes but only 40% of growers report a high level of awareness of the attitudes of consumers.

Each participant was asked their opinion on the consumer's rating of the quality of New Brunswick potatoes available in the marketplace and they were asked for their personal rating of the quality of potatoes available.

TABLE G-39
NEW BRUNSWICK POTATO GROWER'S PERCEPTIONS CONCERNING THE CONSUMER'S RATING OF MARKET PLACE QUALITY

PERCEIVED CONSUMER RATING	PERCENT OF GROWERS
Excellent	11%
Good	39%
Fair	33%
Poor	17%
	100%

In interpreting this Table one can say that 17% of New Brunswick potato growers believe consumers would give a poor quality rating to the New Brunswick potatoes available in the market place.

Table G-40 summarizes the growers personal ratings for the quality of New Brunswick potatoes available in the market place.

TABLE G-40
GROWERS RATING OF THE QUALITY OF N.B. POTATOES AVAILABLE IN THE MARKETPLACE

QUALITY AVAILABLE	PERCENT OF GROWERS
Excellent	17%
Good	39%
Fair	28%
Poor	16%
	100%

From this Table one can conclude that 44% of New Brunswick growers believe that New Brunswick consumers are offered potatoes of only fair or poor quality.

Analysis revealed an inverse relationship: the larger the operation, the lower the rating given to the tablestock potatoes available to consumers.

The growers' views of the products available to consumers does not appear to be consistent with their ratings concerning the quality of potatoes produced. For example, the following table summarizes growers' perceptions concerning the overall quality of potatoes produced in New Brunswick:

TABLE G-41
GROWERS' EVALUATION OF THE QUALITY OF POTATOES GROWN IN NEW BRUNSWICK

QUALITY RATING	PERCENT OF GROWERS
Excellent	30%
Good	57%
Fair	12%
Poor	1%
	100%

Information in Table G-40 and Table G-41 suggest that the best product produced in New Brunswick is not necessarily available for the local table stock market.

GROWERS OPINIONS CONCERNING ISSUES AND SERVICES

As discussed, growers opinions were sought on several issues and services. The following material summarizes the growers viewpoints.

RATING OF SERVICES

Each participant in this study was asked to rate the performance of the provincial and federal government and the New Brunswick Potato Agency in assisting in the development of the industry or in representing growers.

Table G-42 summarizes growers rating of the job done by the provincial government in assisting in the development of the potato industry.

TABLE G-42
GROWERS RATING OF THE PROVINCIAL DEPARTMENT OF AGRICULTURE CONCERNING INDUSTRY DEVELOPMENT

PERFORMANCE RATING	PERCENTAGE
Excellent	7%
Good	32%
Fair	41%
Poor	20%
	100%

Table G-43 summarizes grower's evaluation of the performance of Agriculture Canada regarding the New Brunswick potato industry.

TABLE G-43
GROWERS RATING OF AGRICULTURE CANADA CONCERNING INDUSTRY DEVELOPMENT

PERFORMANCE RATING	PERCENTAGE
Excellent	6%
Good	34%
Fair	42%
Poor	18%
	100%

Table G-44 summarizes the grower's evaluation of the job done by the Potato Agency in representing the interests of the potato growers in this province.

TABLE G-44
GROWER'S RATING OF THE N.B. POTATO AGENCY IN REPRESENTING GROWERS INTERESTS

PERFORMANCE RATING	PERCENTAGE
Excellent	3%
Good	26%
Fair	37%
Poor	34%
	100%

ISSUES

Growers were asked if they favored or opposed the establishment of a national potato agency. Table G-45 summarizes growers' opinions.

TABLE G-45
GROWERS' VIEWS ON A NATIONAL POTATO AGENCY

OPINION	PERCENT
Favor a national agency	58%
Oppose a national agency	23%
No position taken	19%
	100%

Among those who expressed an opinion, 71% of growers favor the establishment of a national agency and 29% oppose the establishment of such an agency.

Analysis of opinions revealed that a marginal difference could be found when the size of the growing operation was considered. For example, among those who produced more than 25,000 barrels, 60% favored the establishment of a national agency compared to a 69% level of support among growers who produced less than 10,000 and an 80% support-level among mid-sized growing operations (10-25,000 barrels).

When asked about the potential impact of New Brunswick growers, were a national agency established, 53% of growers indicated a belief that growers would be better off, 29% reported that growers would be worse off and 14% reported that nothing would change for the grower. Four percent had no opinion concerning the potential impact of a national agency.

When asked the major advantage that would result from a national agency, 46% specifically cited better prices, 22% mentioned better prices along with a quota system, 15% cited new market opportunities and 7% cited better industry cooperation. Other respondents cited individual responses.

When asked about the major disadvantage of a national agency, 50% had no response. Of the 121 growers who responded, 39% (47 growers) noted the potential loss of markets, 22% cited restrictions on acreage and entrance to the industry, 8% noted that the processing industry would be hurt and 10% reported that New Brunswick growers would be overwhelmed by Ontario and Quebec in terms of output and strength. The balance of growers cited individual disadvantages were a national agency established.

The information collected indicates a high level of support among New Brunswick growers for the establishment of a national agency.

LOCAL MARKET INSPECTION

Because of the concern with quality in the local markets, all growers were asked if they would favor or oppose the idea of establishing inspection procedures for tablestock potatoes sold within New Brunswick. Table G-46 summarizes the growers' views.

TABLE G-46
GROWERS' OPINIONS CONCERNING THE INSPECTION OF POTATOES SOLD WITHIN NEW BRUNSWICK

POSITION	PERCENT
Favor Inspection	91%
Oppose Inspection	7%
No Opinion	2%
	100%

Table G-47 provides a summary of growers' responses when they were asked who should supervise the inspection: the federal government, the provincial government, the Potato Agency, or some other group.

TABLE G-47
GROWERS' PREFERRED INSPECTION SUPERVISORY AGENCY

AGENCY	PERCENT
Federal Government	45%
Provincial Government	33%
Potato Agency	10%
Combined Approach	12%
	100%

This data suggests that New Brunswick growers would support an inspection procedure for all sales within the Province. Growers would prefer supervision by either the federal or provincial government.

AGENCY MEMBERSHIP

Preliminary interviews suggested a need to ask growers if they would support or oppose the idea of shippers as voting members of the Potato Agency. Based on the responses, this issue would be too difficult to predict, were a vote to be held. Among growers, 46% oppose the idea of shippers as members of the board, 42% favor having shippers on the board and 12% have no opinion on this issue.

INDUSTRY PROBLEMS

To conclude the growers section of this study, each participant was asked two general questions about the industry. All growers were asked for their opinion of the major problem facing the New Brunswick potato farmer today. Each farmer was also asked about the changes they would like to see in the current system for marketing potatoes.

Table G-48 demonstrates the growers perceptions of the major problems facing the industry.

TABLE G-48
GROWERS' PERCEPTIONS OF MAJOR PROBLEMS FACING THE NEW BRUNSWICK POTATO INDUSTRY

PROBLEM	PERCENT
Low Prices	35%
Cost of Production	24%
Overproduction	13%
Need for a New or Better Markets	13%
Other, Individual Responses	15%
	100%

As a follow-up question, respondents were asked if they thought that the major problem they mentioned would be solved within the next 5 years.

Among those who mentioned overproduction, 52% indicated that the problem would not be solved.

Among those who mentioned cost of production as a problem, 78% indicated that this problem would not be solved over the next 5 years.

Among those who mentioned the need for new markets as a problem 65% indicated that the problem would not be solved.

Among those who mentioned that problem of low prices, 53% reported that the problem of low prices would not be solved over the next 5 years.

Based on these responses, one can conclude that the New Brunswick potato grower is pessimistic about possible solutions to major problems.

When asked about changes they would like to see made in the marketing system, 18% of the growers who suggested a change mentioned the need for minimum prices, 12% noted the need for a change in inspection or grading, 9% noted a change in market development activities, 9% mentioned changes in production quotas, 6% mentioned the border problems, another 6% mentioned the need to eliminate washlines and 6% cited the need for more cooperation.

GROWERS STUDY SUMMARY

The preceding sections have provided a summary of the growers views, opinions and operations related to the potato industry. This material should be considered an essential part of planning for the overall potato industry in this province.

A STUDY OF SHIPPERS,
WHOLESALERS AND RETAILERS

A PROFILE OF SHIPPING, WHOLESALING AND RETAILING OPERATIONS RELATED TO THE NEW BRUNSWICK TABLESTOCK POTATO MARKETS

INTRODUCTION

In order to develop a comprehensive perspective on the tablestock market for New Brunswick potatoes, an important aspect of this research effort involved a study of attitudes, opinions and practices of people involved with the shipping, wholesaling, and retailing of New Brunswick tablestock potatoes. The information presented in the following pages is based on the opinions of a representative sampling of people from three different sectors of the industry. The following pages provide a summary of the research objectives which guided this effort, the methodology employed and the information collected from the sample of industry participants.

RESEARCH OBJECTIVES

Through the process of proposal development and subsequent consultation with the project advisory committee, the following objectives were developed for the three distinct groups of participants.

The objectives which guided the study of those involved in shipping New Brunswick potatoes were as follows:

To determine a shipper's preferred markets.

To determine the level of awareness of consumer preferences and concern for those preferences among shippers.

To determine the attitudes of shippers concerning the need for more inspection services at the shipper or retail level and to determine shippers' overall level of satisfaction with different aspects of the current marketing system.

To provide a demographic profile of the shippers including length of involvement in the industry, location and overall business volumes.

This research effort was designed to achieve the following trade-related objectives:

To determine if a wholesaler or retailer carries New Brunswick potatoes and the reasons for carrying or not carrying the product.

To determine how many suppliers each retailer or wholesaler has for potatoes and the strength of the supply relationship.

To determine the attitudes of wholesalers and retailers towards New Brunswick potatoes and their major competitors.

To determine the level of consumer preferences or interests expressed at the wholesale or retail level.

To determine the retailer's preferred method of receiving potato shipments.

To determine the key factors influencing the decision to select a particular supplier.

To determine retailers overall preferences concerning price, variety and packaging.

The following section summarizes the methodology employed to achieve these research objectives.

RESEARCH METHODOLOGY

In order to insure an adequate sample selection for this portion of the study, efforts were made to secure lists of shippers and wholesalers from existing directories and government resources. Through the development of these lists the shippers were identified in terms of the primary destination of most of their shipments. Efforts were made to insure an adequate selection of a representative sampling from both groups.

The wholesalers interviewed were identified through BMR's ongoing contacts with the food industry in the Atlantic region. The retail units were selected to insure a broad sampling of the major market areas of the province. When completed, this part of the study provided contacts with either wholesalers, shippers or retailers who served every section of New Brunswick.

The information for this section of the research effort was collected through personal interviews with approximately 25 wholesalers and retailers. In some instances, the smaller shippers and distributors were contacted through telephone interviews. The following information provides a summary of the information collected through these interviews.

RESEARCH FINDINGS

NEW BRUNSWICK POTATO SHIPPERS PREFERRED MARKETS

New Brunswick shippers appear to be divided into two groups: those that sell primarily to U.S. markets, with sporadic sales in New Brunswick, and those who sell most of their product on the provincial market.

The comments from those who sell to the U.S. markets concerning market preferences indicate that they prefer the U.S. market because: the prices they receive are higher than those offered by New Brunswick buyers; they may not have to pack their potatoes (many shipments are in bulk); their individual shipment volumes tend to be higher; local, store to store, delivery is not required and many of the shippers claim long term contacts and well established relationships with U.S. wholesalers and retailers.

The only major concern expressed about servicing the U.S. market was the recent, increased inspection at the border.

On a day to day basis, these inspections constitute a major irritant, which results in shippers "shopping around" for border stations where U.S. inspectors are not present, essentially a rerouting of loads through alternate border crossings. Shippers also consider these increased inspections as a form of harassment and as an indicator of the potentially limited viability of the U.S. markets for New Brunswick shippers.

It is almost paradoxical to note that while these shippers recognized the potential loss of the U.S. markets, they did not seem interested in reapproaching a more long term market within the province: were the U.S. market to be lost or diminished, most of this group of shippers indicated that they would prefer to redirect their current marketing and delivery systems to serving larger Canadian markets. Surprisingly, it appears to be a widely held belief that it would take less time and effort to reestablish themselves in the national market than in the provincial market.

Those who ship within the province seemed to express similar reasons for involvement in their preferred market. They reported to prefer the local markets because of: established long term contacts and contracts; the prices received for their potatoes; consumer acceptance of their product; proximity of the market and the absence of red tape such as that involved with border crossings.

CONSUMER.AWARENESS

Those shippers supplying the U.S. market believe that, for the most part, the U.S. consumer prefers a washed potato, in five or ten pound poly bags. They receive information about consumers primarily through the broker, wholesaler or retailer who is handling their sales, not through any direct assessment of consumer demand. They do not seem to believe that the consumer identifies particular brands, but does purchase New Brunswick potatoes because of their image in the U.S. market as a quality product. These shippers, in fact, are convinced that U.S. buyers view their product as equal in quality with PEI potatoes.

Generally speaking the shippers selling within New Brunswick believe that they are providing what the consumer wants - a quality product at a low price. These shippers cite the lack of complaints from consumers as evidence of the level of consumer acceptance of the product.

This group _generally_ provides the market with an unwashed product in a paper package. There is a belief among this group that this type of product presentation is generally acceptable to the New Brunswick consumer. As they also noted, this package results in lower handling and packaging costs for the shipper.

Many of the shippers serving local markets and some of the others expressed an awareness of the increasing consumer demand for washed potatoes, but some indicated that the consumer needed to be better educated about "the benefits of the unwashed potato"; this education would, in turn, produce a lower demand for washed potatoes and an increased demand for unwashed potatoes.

INSPECTION AND MARKET CONDITIONS

Virtually all shippers believe that the present inspection standards applied to potatoes shipped out of province should also be applied to products shipped on the local market. They believe that better inspection of local potatoes would result in a higher quality product. Those shippers selling primarily in the U.S. market believe that the lack of inspection has resulted in a poor quality product on the provincial market.

Those suppliers of local markets are as much in support of increased inspection as are those who ship to other areas. Local shippers believe that they offer the consumer a high quality product and that inspection will only result in a better image for the product.

Many shippers, regardless of the market they serve, believe that the Canada no. 2 grade should be abolished because it only lowers the overall image of the potato. The availability of this grade also reduces the overall quality of potatoes offered to the market. People just don't seem to understand the labelling or the meaning of number 2 grade and subsequently judge all potatoes on the basis of quality of no. 2's at a particular point in time.

The shippers selling in the U.S. appear to have little difficulty in finding markets. For the most part they sell to brokers or wholesalers who use past experience, quality and price as criteria in selecting suppliers. This group claims little difficulty in finding new buyers if they are priced out of existing markets. Many of these shippers stated that they have experienced difficulty in maintaining the required continuity of supply to their markets because of their occasional inability to fill orders promptly. They attribute this to the difficulty they sometimes experience in purchasing potatoes from New Brunswick growers, who "hold on, waiting for a better price". They report that PEI shippers do not appear to experience this problem. PEI shippers appear to be more aware than their New Brunswick counterparts of the need for consistency of supply to existing markets.

The lack of ability to consistently supply local demand is also an issue with shippers in the New Brunswick market.

There seems to be a wide spread lack of support of the concept of a national marketing agency among shippers. The primary reasons cited for this lack of support involved a fear of loss of the U.S. market and restrictive production quotas. Some also believed that a quota system would create an inefficient industry protecting poorer farmers by allowing them to continue growing low grade potatoes.

Many shippers believe that normal market forces are not being allowed to direct the industry. They claim that the government provides unfair subsidies to some competitors' washlines, provides grower grants and subsidies that keep inefficient growers in business and fails to develop new market opportunities for potatoes. Many also believe that the government should be working more vigorously toward solving the border problems.

Along with a discussion of shippers views on overall market conditions, this study also collected information on the demographic characteristics of the shippers interviewed.

SAMPLE DEMOGRAPHICS

Because of their impact on the industry, and of time constraints, this portion of the overall research project primarily involved personal contact with the larger potato shippers and telephone contact with those involved in smaller shipping operations in the province.

The average length of involvement in the shipping industry is 17 years. The length of involvement of people interviewed ranged from three to thirty-five years. Those who have been involved with the U.S. market for an extended period noted changes over the past 10 to 15 years with a shift from Ontario and Quebec to the eastern seaboard of the U.S. They cited competition from PEI and Quebec and provincial government pressure (especially in Quebec) to "buy local" as the reasons for this change. They also cited the increase in production in Ontario as a basis for the change.

Those primarily involved with servicing the New Brunswick market have been doing so for an extended period of time and have well established contacts in this market.

The annual volume sold by those shippers interviewed varied from 100-150 trailer loads to more than several thousand, with an average of approximately 400 truckloads per year.

FUTURE OF THE TABLESTOCK INDUSTRY

Among those shippers interviewed who were selling to the U.S. market a small number expressed a belief that a major portion of the New Brunswick market could be regained from PEI producers. These shippers were planning or had begun to sell on the New Brunswick market. A few others felt that the New Brunswick grower's share of the provincial market would continue to decrease because of poor New Brunswick quality and aggressive promotional activities by PEI.

Others claim that future changes in the shipping sector will result from an anticipated reduction in the number of producers serving this market; this change will not be accompanied by a decrease in overall acreage. This, in turn, will result in more competition, the potential for more grower control and a reduction in a shipper's ability to serve the wholesale and retail markets. The shippers did not project a reduction in the number of shippers in the market place.

As noted previously, opinion is divided on the future of the local market. Those shippers presently serving the provincial market appear to believe that the local market is relatively secure for them. The shippers who do not serve this market appear to be convinced that the higher quality of PEI potatoes being shipped into the local market will continue to permit PEI to make further increases in its market share at the cost of New Brunswick suppliers.

WHOLESALERS AND RETAILERS

WHOLESALERS

All major wholesalers who serve New Brunswick and the Atlantic region were interviewed for this study.

All but one of the wholesalers who supplied potatoes to their stores supplied both NB and PEI potatoes and indicated a willingness to buy and stock more New Brunswick potatoes were there sufficient consumer demand and product quality and a competitive price. The other wholesaler, supplying a major chain, carried only PEI potatoes through their distribution system. They claimed that New Brunswick potatoes were of poor quality and expressed no wish to stock them. Affiliated stores do buy NB potatoes directly from growers or shippers. The representative for this firm reported continuing growth in sales of PEI over the past 5 years.

Wholesalers, along with retailers, expressed a high level of dissatisfaction with the quality of New Brunswick potatoes. Wholesalers seemed most dissatisfied with the lack of cooperation evidenced in the New Brunswick market place; for example, it was noted by several that PEI's system can provide a truck load of potatoes more quickly and with less effort on the part of the wholesaler than can NB's system.

Each wholesaler interviewed appeared to place a higher value on PEI potatoes. Some cited the differences between potatoes grown in sand and potatoes grown in rocky soil. Others cited the fact that PEI potatoes simply produced a lower level of consumer complaints. More than one noted that PEI potatoes were of better quality because they were an export item and thus more carefully inspected.

The primary reason for carrying New Brunswick potatoes seemed to be more a social and political obligation than a reflection of product quality or aggressive marketing approaches by the majority of New Brunswick suppliers. In general, wholesalers cited a higher than expected level of sales for PEI potatoes, given our awareness of consumer buying patterns. This indicates that wholesalers may not have a complete understanding of sales volumes at the retail level.

One wholesaler did report a concerted effort to provide and promote N. B. Grown potatoes through the introduction of a new, 10 lb. poly pack of N. B. potatoes. This was specifically designed to compete with the PEI product and the wholesaler indicated high expectations concerning the potential profitability.

This information suggests that while wholesalers are stocking New Brunswick potatoes, the service provided by PEI and the attitudes of wholesalers operating within New Brunswick make change a difficult expectation. Significant changes in the way in which New Brunswick potatoes are marketed will be required if one expects to expand the sale to NB wholesalers.

From the wholesalers perspective, one should anticipate continued efforts to more firmly establish and expand their role in the distribution of potatoes within this market. This can provide opportunities for those shippers or producers capable of meeting wholesaler demands.

RETAILERS

Interviews with retailers suggested an even more negative perception of the quality of New Brunswick potatoes than found among wholesalers. While each retailer carries New Brunswick potatoes, we often heard complaints about the packaging, availability, grading and overall quality of the products offered to consumers. A comment which seems to typify this feeling is "New Brunswick growers only attempt to meet the grade while PEI growers try to surpass the grade".

Another comment which appears to summarize some of the reactions of retailers is "New Brunswick suppliers will not spend five cents to present the product nicely; they think that the consumers are bound to buy it just because it is local".

Interviews in the Saint John area provide some of the better examples of the negativity towards the New Brunswick potato which exists in the market place. For example, one retailer made the following comment: "The average sales of PEI potatoes in one day exceeds a week's sales of New Brunswick potatoes." While other information collected from this study suggests that these sales volumes are unrealistic, this comment is included to demonstrate that a persistently negative attitude can distort reality. Most retail interviews indicated a strong antipathy towards New Brunswick potatoes.

The comments from the retailers concerning their general attitudes towards New Brunswick potatoes demonstrate the difficulty of the task ahead if New Brunswick growers are to recover their lost share of the New Brunswick tablestock market.

OVERALL IMPRESSIONS: WHOLESALERS AND RETAILERS

People interviewed for this study reported that most PEI potatoes available to the New Brunswick market come through a limited number of suppliers. Both wholesalers and retailers indicated that only one call was required to obtain the needed volumes. On the other hand, while some wholesalers and retailers have developed an exclusive relationship with a grower (which may cover more than one area of the province, or a large number of stores within the chain) only one wholesaler reported recent arrangements for the product to be delivered centrally in sufficient volume to provide all stores in the chain. In general, we found that back door delivery remains the most common form of distribution for the shipper or producer supplying the New Brunswick retailer.

The negative attitude toward New Brunswick potatoes on the part of retailers and wholesalers seems to cloud their perception of consumer demand or preference for New Brunswick potatoes. While information in the consumer survey suggests that the consumer does not have an overwhelmingly negative perception of New Brunswick potatoes but every retailer and most wholesalers involved in this study suggested that they heard a litany of complaints about New Brunswick potatoes, especially in relation to the consistency of size in the packs and the overall quality of the product. They believe that the consumer prefers PEI potatoes. None of the wholesalers and retailers interviewed noted the possible benefit of the lower price and most did not cite the fact that the product was locally grown when talking about consumer preference and reactions.

No particular patterns of consumer preferences were indicated by either retailers or wholesalers for packaging sizes. The preferred size of packaging varied from store to store and within various areas, depending on the type of customer served. There was a clear indication of consumers' preferences for poly or plastic packaging. Both retailers and wholesalers noted increasing demand for washed potatoes.

Some retailers noted that varieties were often not marked on the package; this was especially true in Fredericton where retailers cited a strong demand for a particular variety - Green Mountain.

Each retailer and wholesaler in this study was asked for his opinion regarding their preferred methods of shipments, supply, product, price and related factors. Three of the four major wholesalers indicated an interest in a more centralized purchasing, warehousing and distribution system for potatoes. Were these wholesalers in a position to select a supplier for all their stores, that supplier would be selected on the basis of price, ability to supply a large volume and overall quality.

Among retailers there continues to be a preference for local supply, back door delivery and a palletized product. Retailers expressed a desire to continue to have ongoing contacts and relationships with local growers. Most of the retailers have enjoyed fairly long term relationships with their suppliers. However, some changes have taken place because complacency on the part of some suppliers has produced inferior quality and service bringing new market opportunities for other suppliers.

To summarize the information collected from wholesalers and retailers, we are left with the distinct impression that there is a widely held belief on their part that PEI will eventually take over the entire tablestock market. This can be demonstrated by the following wholesaler's comment: "Compared to PEI, NB is not in the potato business....NB farmers are not proud enough of what they grow to put up a good pack of potatoes".

A retail outlet with space limitations which restrict it to carrying only one size (10 pound washed poly) of PEI's, in addition to a full range of NB potatoes, will be expanding next year. Following this expansion the outlet will be stocking 10, 20 and 50 pound PEI potatoes. The produce manager stated that "when this happens NB will be kicked out of the store. The customers are dissatisfied with NB and will buy PEI if given the choice. NB must change its grading practices or lose the market."

A note of optimism can be found within the comments from retailers and wholesaler. Some suggest that promotional efforts directed at changing the consumers' perceptions of the NB potato, and growers' efforts toward more consistent production of quality potatoes could, over the long run, begin to restore New Brunswick's share of the provincial tablestock market. However, according to the produce manager of a large supermarket, an observer of the increasing erosion of sales of NB potatoes by PEI over the last 3-5 years: "it's not an impossible job but it will take a long time and lots of money to recapture the market".

Counter to the commonly held belief among growers, wholesalers and retailers suggested that bruising, light burning and other detriments to product quality do not always occur at the wholesaler or retailer level. From the wholesaler and retailer perspective the issue of quality of potatoes at the store level rests solely on the New Brunswick grower. Most indicated that potatoes are turned over very quickly at the warehouse and store level. This could be born out by the fact that, almost without exception, retailers order potatoes twice a week.

SUMMARY

The views of shippers, wholesalers and retailers demonstrate clearly some of the problems related to the tablestock market. The views expressed in this section provide solid evidence of the damage which can result when a product develops a negative image among those people necessary for effective product distribution and consumer market access. The lack of confidence in New Brunswick potatoes evidenced by wholesalers and retailers obviously deters them from trying to increase their overall sales volumes.

A STUDY OF CONSUMERS

A STUDY OF CONSUMERS

INTRODUCTION

The study of the potato industry placed particular emphasis on the local tablestock market for New Brunswick potatoes.

The following pages provide an outline of the research objectives which guided this part of the study, the research methodology employed and the major research findings. This report on the consumer market concludes with a brief section on the conclusions drawn from the research.

In accord with the marketing concept, the attitudes, opinions and behaviours of consumers should constitute an essential part of any market study. This study was therefore designed to provide decision-makers with an in depth perspective on different aspects of the consumer market.

According to the terms of reference and research proposal, this study of the consumer market was specifically designed to:

> determine the overall buying behaviour associated with tablestock potatoes. This will include an assessment of the customers overall level of awareness and attitudes concerning the types of products, packaging, size, brands and province of origin of the product;

determine the key variables which affect or determine the products selected by consumers;

provide a description of the consumer's image of the New Brunswick potato and to describe the image for potatoes from competing areas and the images for other areas and substitute products;

determine if customers are eating more, less or about the same amounts of potatoes as two years ago and what they expect their future consumption patterns to be like;

determine the patterns of consumption related to potato substitutes such as pasta and rice;

determine how consumers prepare potatoes and if there is an openness or interest in new methods of preparation; and

provide a demographic profile of the respondents including age, family size, area of residence, (education and occupation of grocery buyers) and income level of the household.

To accomplish these research objectives, BMR employed different research methods. These methods are discussed in the following section.

RESEARCH METHODOLOGY

RESEARCH DESIGN

To collect the broad base of information needed for this study, BMR suggested the use of both quantitative and qualitative methodology.

To understand consumption patterns and overall preferences, BMR proposed and implemented a province-wide telephone survey of 500 household buyers.

To understand the more qualitative nature of product image and consumer preference, BMR proposed and implemented a series of eight focus groups in four different areas of the province.

The combination of these two research approaches has provided a solid basis on which the consumer patterns and preferences can be discussed.

SAMPLING

PROVINCE-WIDE STUDY

To conduct the province-wide telephone survey, BMR designed a sampling procedure to select 500 households through a proportionally allocated random selection procedure. Such a procedure provides for a geographical representation of all areas of the province.

The households were selected using a random digit dialing procedure combined with a selection of active banks of numbers from the nine provincial telephone directories.

Once a household was selected, interviews were conducted with the person in the household who was responsible for the household grocery shopping.

To select households and respondents, the following contacts were made:

TABLE C-1
SUMMARY OF CONSUMER CONTACTS

TYPES OF CONTACTS	NUMBER OF CONTACTS
Completed Interview	505 (59%)
Refusals	267 (32%)
Business Numbers	78 (9%)
	850 (100%)

These contacts produced a sample of respondents with characteristics summarized in the following tables.

TABLE C-2
GEOGRAPHICAL DISTRIBUTION OF RESPONDENTS

TELEPHONE DIRECTORY	PERCENT RESPONDENTS	PERCENT ACTUAL TELEPHONE NUMBERS
Bathurst Area	9%	11%
Campbellton	6%	5%
Chatham	6%	6%
Edmundston	8%	8%
Fredericton	16%	16%
Moncton	24%	24%
Saint John	18%	21%
St. Stephen	4%	4%
Woodstock	9%	5%
	100%	100%

The variances between the actual and sampling distributions are not significant.

The following table summarizes the linguistic breakdown of the survey respondents and the actual population.

TABLE C-3
LINGUISTIC BREAKDOWN

MOTHER TONGUE	SAMPLE	POPULATION
English	66%	64%
French	33%	35%
Other	1%	1%
	100%	100%

From this one can conclude that this sample adequately represents the overall population.

When asked about the language spoken most often in the home, 75% of survey respondents claimed English as the language of the household.

The respondents in this survey were primarily female (84%), consistent with known patterns of shopping behaviour.

The following table demonstrates the income distribution of households participating in this survey.

TABLE C-4
INCOME DISTRIBUTION

LEVEL OF INCOME	SAMPLE	POPULATION
under $15,000	37%	30%
$15 - 19,999	15%	13%
$20 - 24,999	11%	11%
$25 - 29,999	8%	9%
$30,000 or above	29%	37%
	100%	100%

The income estimates of the New Brunswick population are based on information from Statistics Canada: Income Distribution By Size (Publication No. 13-207) which is based on income levels as of 1985.

The respondents in this survey are compared to the overall population on the basis of education levels in table C-5.

TABLE C-5
EDUCATION LEVELS

HIGHEST LEVEL OF EDUCATION	SAMPLE	POPULATION
Less than High School	48%	55%
High School Graduate	30%	13%
Vocational or Other Non-University	6%	19%
Some University Attendance	5%	8%
University Degree(s)	11%	5%
	100%	100%

The major variance in the sample and population is evidenced in the vocational or non-university grouping, likely explained by the fact that most of the respondents were female and thus less likely to attend vocational school.

The variances in income, as demonstrated in Table C-4 vary somewhat at the high and low ends of the distribution, a common occurrence.

FOCUS GROUPS

Participants who completed the province-wide study, had children in their home and were under the age of fifty years and lived in proximity to either Fredericton, Moncton, Bathurst or Saint John were asked to participate in focus groups. Because recruitment for these groups was difficult, a supplemental questionnaire was also needed for recruitment. Through these two resources, a minimum of 12 participants were recruited for each of the eight scheduled groups.

QUESTIONNAIRE DESIGN

The questionnaire designed for this study can be linked directly to the research objectives. A copy of the questionnaires used are included in Appendix B.

The questionnaire was pretested with 25 respondents and minor revisions were then made.

The language of the interview was determined by survey respondents.

DATA COLLECTION

BMR recommended the use of a telephone survey because of the timeliness and cost of this project.

All interviews were conducted by BMR's trained, bilingual interviewers through BMR's central facility in Fredericton. On average, a minimum of four attempts were made to contact each household.

The average length of an interview was 18 minutes. The length of interviews ranged from 10 to 43 minutes. Interviews conducted in French tended to be longer than those conducted in English.

Among the 505 interviews completed, 95 were completed in French.

DATA ANALYSIS

Data was edited, coded and computerized by BMR staff. The data will be maintained on PC disk until June, 1988.

Analysis of data was completed using SPSS. A supplemental file of frequencies and crosstabulations has been made available to staff of the provincial Department of Agriculture.

The data collected from the focus groups is available on audio tape. The tapes have been presented to the Department of Agriculture. The highlights and details from this section of the project will be presented within the framework of the report on the province-wide study.

The following sections provide a detailed summary of consumer attitudes, opinions and behaviours related to the New Brunswick tablestock market.

RESEARCH FINDINGS: CONSUMER STUDY

FOOD CONSUMPTION PATTERNS

In order for those involved in the potato industry to better understand New Brunswick consumers, each respondent was asked about their overall food consumption patterns related to some of the major types of food. The following table summarizes changes in household eating patterns over the past two years.

TABLE C-6
FOOD CONSUMPTION CHANGES
TWO YEAR PERIOD

	PERCENT CONSUMPTION FREQUENCY		
FOOD GROUP	EATING MORE	EATING LESS	EATING THE SAME AMOUNT
Beef	14%	32%	54%
Pork	10%	36%	54%
Chicken	38%	11%	51%
Fish	40%	18%	42%
Salads	46%	10%	44%
Vegetables	39%	5%	56%
Potatoes	14%	33%	53%
Rice	29%	11%	60%
Pasta	20%	18%	62%

Table C-6 demonstrates the decreasing consumption of red meats and potatoes and the concurrent increase in consumption of chicken, fish and rice.

In the process of analyzing this data, the overall information for all questions such as those summarized in Table C-6 were reviewed within the context of the age and the area of residence of respondents. This was done to determine if different consumption patterns could be found within these groupings. Additionally, the information was reviewed on the basis of mother tongue to determine if any linguistic group differences existed which should be taken into account in designing promotional programs; no significant differences within linguistic groups were found to suggest the need for different promotional strategies. In reviewing responses concerning consumption over the past two years, only a limited number of changes were noted:

> There appears to be a change in eating patterns around the age of forty-five. For example, respondents over the age of forty-five were more likely to suggest that people in their households were consuming the same amount of all food products, while those under the age of forty-five were more likely to report changes in their eating patterns. This might suggest that experimentation may have ended at the mid-life period and people settle into a "fixed" eating pattern. This could also be related to the beginning of the stage when children leave the home.
>
> While few consumers in this province could be described as avid consumers of pasta, in a form other than lasagna or spaghetti, those under the age of forty-five were more likely to report an increasing pattern of consumption within their households. This may provide some indication of the potential for long term changes in the eating patterns in this province.
>
> While many respondents reported an increase in their consumption of salads and vegetables, that increase was far more noticeable among respondents under the

age of forty-five years: an average of 50% of those under the age of forty-five reported an increase in their consumption of salads compared to an average of 35% of those over forty-five reporting such an increase.

The following responses were received from the 33% reporting a lower level of potato consumption when they were asked why people in their households were consuming less potatoes today than two years ago:

.. 34% reported that they were consuming less because of the high calories associated with potatoes and the dressings used on them (the potato serving as opposed to the potato).

.. 21% reported that they had developed a stronger preference for rice, pasta or other substitutes.

.. 10% noted that their family size had decreased so they were consuming less potatoes.

.. Another 10% noted that they were consuming less because potatoes were too slow to prepare.

.. 8% reported that their tastes were changing and potatoes didn't seem to fit/taste as well as a few years ago.

.. 6% reported that they were eating less of the traditional meals of 'meat and potatoes' and their consumption of potatoes was therefore decreasing.

.. 5% reported that they were getting older, their appetite was decreasing and they were thus consuming less potatoes.

The following comments were made by the 14% of respondents who reported that people in their households are consuming more potatoes now than two years ago:

.. 47% said the change resulted from an increase in either the number or age of their children.

.. 9% reported that they were consuming more because potatoes were more nutritious.

.. 6% cited higher family consumption because of their increasing awareness of different means of preparation.

.. 4% cited potatoes as a more economical side dish.

.. Another 4% claimed higher consumption because of a higher enjoyment of the taste of potatoes.

.. 15% could not cite a particular reason for their increase in consumption

Among the 29% who cited a higher level of rice consumption within their household/family:

.. 27% cited the taste as their basis for increased consumption.

.. 21% mentioned the versatility of rice.

.. 17% mentioned the ease of preparation of rice.

.. 10% cited the health benefits of rice.

.. 10% cited the changing needs of their growing family as a basis for increased consumption.

Among that 14% reporting a decrease in rice consumption over the past two years:

.. 52% reported a change in their taste preferences.

.. 7% cited a need for a change in their diet for health reasons.

.. 4% reported that the number of people in their household had decreased.

.. 19% reported no special reason as the basis for a change in consumption.

Because national food patterns suggest that the consumer is eating more rice and pasta as a substitute for potatoes, this study tried to determine the extent of the change in this province as well as the rationale underlying whatever change might exist.

HOUSEHOLD MEALS

Each respondent was first asked about the weekly consumption pattern for their households. Eighty-four percent of the households in New Brunswick have the main meal in the evening, 12% have the main meal of the day at noontime and 4% of the respondents reported that the time of the main meal varies between noon and evening.

MAIN MEALS

Table C-7 summarizes New Brunswickers choice of side dishes for the seven main meals served in their homes in a typical week.

TABLE C-7
SIDE DISH CHOICE FOR SEVEN MAIN MEALS
IN AN AVERAGE WEEK

SIDE DISH	AVERAGE NUMBER OF SERVINGS
POTATOES	4.8
RICE	1.1
PASTA	1.1
	7.0

As indicated, most New Brunswick households do consume a significant amount of potatoes at the main meal of the day. Table C-8 summarizes the types of potatoes served most often for the main meal of the day in New Brunswick homes:

TABLE C-8
TYPES OF POTATOES SERVED FOR MAIN MEAL OF THE DAY

TYPE	PERCENT OF SERVINGS
BOILED	36%
MASHED	30%
BAKED	17%
FRENCH FRIES	5%
COMBINATION/VARIETY	12%
	100%

Among those who claim to serve potatoes at each of the seven main meals per week, boiled or mashed potatoes are served at approximately 70% of all these meals.

Thirty-four percent of those who serve boiled potatoes at the main meal do so because of the ease of preparation and 18% reported that boiled potatoes were served because of the taste. Among those serving boiled potatoes, 21% reported no particular reason for doing so.

Among those who served mashed potatoes at the main meal of the day, 41% said that they do so because of the taste, 19% do so because mashed are preferred by the family and 11% cited the ease of preparation as a reason for serving mashed.

Among those who served baked potatoes, 34% reported doing so because of the taste, 29% cited the ease of preparation and 21% mentioned that this was the most nutritious way to serve potatoes.

When people serve rice as a part of the main meal of the day, 52% serve white rice and 38% serve some form of packaged rice; only a small amount of brown rice is served.

When pasta is served at the main meal it is served as the main course, not as a side dish.

LUNCHES

On average, New Brunswickers have five lunches per week prepared in the home. Potatoes are served at about one of those five lunches per week and rice is served an average of less than once a week.

The fact that neither rice or potatoes are consumed at lunch is explained by some of the information collected through the focus groups. In the general discussions respondents mentioned the "soup and sandwich" lunch and other foods which could be used for quick, informal meals.

When asked what type of potato is served most often for lunch at their home, 43% of all respondents reported that french fries were most commonly served for lunch. Fifteen percent mentioned boiled potatoes for lunch, 7% mentioned baked potatoes, 7% mentioned mashed and 28% cited a variety of servings.

When respondents were asked the type of rice they would be most likely to serve at lunch, 47% mentioned white rice and 34% cited packaged rice.

BREAKFAST

On average, breakfasts are served six days a week in New Brunswick households. Some type of potato is served at less than one breakfast in six. If potatoes are served, they are usually served as home fries.

MARKET PLACE IMAGES

PRODUCT IMAGES

To try to understand why people serve different products and to understand what they think of potatoes, pasta and rice, each respondent was asked a series of questions. The following tables summarize the New Brunswicker's view of these competitive choices.

TABLE C-9
PRODUCT IMAGES

PRODUCT CHARACTERISTICS	PERCENT SELECTING: POTATOES	RICE	PASTA	COMBINATION
Most nutritious product	54%	16%	21%	9%
Product with best taste	54%	15%	22%	9%
Product with best $ value	57%	20%	20%	3%
Product preferred by family	62%	9%	17%	12%
Product offering most variety	47%	18%	22%	13%
Product most convenient to prepare	40%	35%	10%	15%
Product with lowest calories	29%	58%	8%	5%
Product for today's life style	50%	27%	14%	9%

Along with these attributes or images, the different perceptions of the three products were also explored in conjunction with specific types of food. This information collected from respondents concerning foods is presented in Table C-10.

TABLE C-10
FOOD-RELATED PRODUCT CHARACTERISTICS

PRODUCT CHARACTERISTICS	PERCENT SELECTING:			
	POTATOES	RICE	PASTA	COMBINATION
Product which goes best with beef	89%	4%	1%	6%
Product which goes best with pork	77%	15%	2%	6%
Product which goes best with chicken	55%	30%	-%	15%
Product which goes best with fish	81%	13%	1%	5%
Product best for today's meals	72%	10%	5%	13%

The information in Tables C-9 and C-10 provide indications for the absence of change among New Brunswickers in terms of their overall eating patterns. People in this province tend to prefer potatoes to either rice or pasta and tend to think of potatoes more often than the others in all areas other than caloric content and ease of preparation.

The calorie and convenience attributes may provide the best explanation of the changing consumption rates nationally and provide the basis for suggesting the potential for change within this province. The information collected through the focus groups confirm these threats to the long term acceptance of potatoes as the primary side dish. In each area of the province people mentioned their changing eating style - the quicker meals, the lack of traditional "family" meals and the changes in preparation as a result of the use of microwaves. Regrettably, according to participants, potatoes cooked in a microwave do not have the same appeal as those cooked in an oven; the solution for many involves baking potatoes in a conventional oven after the microwave, a process which reduces the convenience of preparation.

Focus group participants also cited the calorie content of the potato serving, the potato and the butter, gravy, sour cream or other sources used along with the potato. Many noted that the plain potato was no higher in calories than rice, and likely lower than pasta, but that did not really matter because the potato was rarely ever served without condiments. To try an appeal which focuses on the fact that potatoes are no higher in calories than other choices denies the reality of the styles in which potatoes are consumed.

IMAGES OF THE PERSON WHO PREFERS DIFFERENT PRODUCTS

To provide the basis for potential advertising campaigns and to provide insight into the images people have of the potato and its major competition, participants in each of the eight focus groups were asked to describe the type of person who was most likely to select each of the three competitive products, potatoes rice and pasta, over the others, as a side dish. The following information summarizes the views expressed in the groups about what the discussions referred to as the 'potato person', the 'rice person' and the 'pasta person'. The descriptions presented are based on actual comments of participants in the groups (readers are encouraged to listen to the tapes from the groups for a more detailed discussion of the different images).

POTATO PEOPLE

The person who prefers potatoes to rice or pasta is.....

...'down-home' and country.

...probably not a 'yuppie' but a more settled person - the yuppie is the type who is always in a hurry...potatoes are just not the type of food for a fast-paced life.

...likely large or heavy person, a hard worker who works at some type of labouring job.

...just an ordinary person because everyone in this area eats potatoes every day....the one who chooses potatoes is just one of us...an average New Brunswicker.

POTATO PEOPLE (CONT)

The person who prefers potatoes to rice or pasta is.....

...Canadian or North American (people in other areas do not seem to eat as many potatoes as North Americans and people everywhere know that Canadians love potatoes).

...old-fashioned and traditional.

...different in terms of the types of potato...somehow, a person who serves french fries is different from the person who serves boiled potatoes...perhaps less traditional.

...someone who does not mind doing the same thing day after day....someone who is a 'meat and potatoes' person.

...a good, old-fashioned Maritimer.

...an older....down to earth....heavy....man.

...everyone...there just is not a person who would not prefer potatoes.

RICE PEOPLE

The following material summarizes the images developed when people in the focus groups were asked to discuss the type of person who would prefer to eat rice rather than potatoes on a regular basis.

The person who prefers rice as a side dish to potatoes or pasta is.....

...single and can have whatever s/he wants.

...concerned with convenience and wants foods that can be prepared quickly.

RICE PEOPLE (CONT.)

The person who prefers rice as a side dish to potatoes or pasta is.....

...someone who likes variety.

...weight conscious.

...health conscious...energetic and athletic.

...thin...and oriental...and healthier.

...a world traveller...a more cosmopolitan person...someone who has experienced a variety of tastes.

...a more modern person..a more creative person.

...a time saver...someone who does not want to be bothered peeling potatoes...otherwise another ordinary person.

PASTA PEOPLE

In the focus groups it became fairly obvious that pasta, as a side dish, had not made significant progress as a competitor for potatoes. In general, those in the group and those in the province-wide study both placed little emphasis or gave little indication of the use of pasta as a side dish. This absence of familiarity caused the image of pasta to be clouded by the image of lasagna and spaghetti, the main meal form of the product. Additionally, those in the groups suggested that they referred to Kraft Dinner when they thought of pasta served as a side dish. The following comments about people preferring pasta should be reviewed within the context of this confusing image of product type and use.

The person who prefers pasta over rice or potatoes is...

...someone who is out of everything else.

...someone who likes to try different things.

...spicy and outgoing...a lover of life.

...adventuresome..because pasta dishes tend to be exotic and flavourful.

...someone from the lower income levels...someone who cannot afford other choices.

...outgoing and energetic.

...someone who has been exposed to a variety of tastes.

...young...just a child. Children appear to be the pasta (Kraft Dinner) people in New Brunswick households.

...someone who is not afraid of gaining weight.

...a large, jolly person.

...a person who likes to eat...and have a good time.

...a six year old child.

...a woman who attends a lot of showers and parties and eats a lot of macaroni salad.

IMAGE SUMMARY

These images perhaps provide the best explanation for the current strength that potatoes have in the New Brunswick markets. People see potatoes as a part of the traditional life styles and the traditional meals.

The specific discussions about meals revealed that rice is gaining somewhat in popularity but that it continues to be served with what is referred to as Chinese cooking. Based on the focus groups discussions it also appears to be used more often in the preparation of casseroles, a type of meal gaining increasing popularity because of the use of microwaves.

Pasta, as noted, has not made significant gains in this market. People report an average of one pasta-type main meal per week, but there are few consumers serving fresh pasta as a side dish; in fact, few consumers seem to have actually thought of this as a possible alternative to potatoes.

This information suggests that potatoes are the 'traditional' product and this image has served the product well. However, the concern for the future should involve an updating of the image, perhaps anticipating future changes and the potential threat from pasta and rice as Maritime eating patterns come in line with changes in other areas of the country.

These images and consumption patterns provide the rationale for the different level of consumption of potatoes, rice and pasta in this province. The following information contains the specific volumes of consumption of rice and potatoes reported by consumers.

HOUSEHOLD CONSUMPTION OF RICE AND POTATOES

In the development of an understanding of any market, it is essential to know the size of the potential markets and the competition within that market.

In the province-wide study of New Brunswick households, each participant was asked for the total weekly household consumption of rice and potatoes. The information collected is summarized in the following tables.

TABLE C-11
WEEKLY HOUSEHOLD CONSUMPTION OF RICE

CUPS CONSUMED	PERCENT OF HOUSEHOLDS
None	24%
One cup	16%
Two cups	19%
Three cups	13%
Four cups	10%
Five or more cups	18%
	100%

The average weekly consumption of rice among all New Brunswick households is 2.59 cups (uncooked) per week. Among those households which report eating some rice on a weekly basis, the average consumption is 3.41 cups of rice.

Each person in this study was asked how many pounds of potatoes, excluding any frozen french fries or instant potatoes, were consumed in their home in an average week. Table C-12 summarizes the overall consumption patterns.

TABLE C-12
HOUSEHOLD CONSUMPTION OF FRESH POTATOES (POUNDS PER WEEK)

VOLUME	PERCENT OF HOUSEHOLD
Five Pounds or less	49%
Six to nine pounds	26%
Ten to twenty pounds	17%
More than 20 pounds	8%
	100%

Among all households in this study, the average consumption is 9.13 pounds per week.

Using this level of consumption of fresh potatoes, one can project the total volume of the tablestock market in accord with the following:

N.B. TABLESTOCK MARKET: ESTIMATED VOLUMES

AVERAGE WEEKLY CONSUMPTION		9.13 LBS.
TOTAL HOUSEHOLDS		225,000
TOTAL ESTIMATED VOLUMES		
	WEEKLY	2,054,250 LBS.
	ANNUALLY	106,821,000 LBS.
	ANNUALLY	1,068,210 CWT.

This data is not inconsistent with data from Statistics Canada (drawn from Publication No. 32-230: Apparent Per Capita Food Consumption, 1986) which reports the following information.

STATISTICS CANADA MARKET ASSESSMENT

AVERAGE WEEKLY CONSUMPTION		8.35 LBS
TOTAL HOUSEHOLDS		225,000
TOTAL ESTIMATED VOLUMES		
	WEEKLY	1,878,750 LBS.
	ANNUALLY	97,695,000 LBS.
	ANNUALLY	976,950 CWT.

The estimates for New Brunswick are extrapolated from national material collected by Statistics Canada. This may explain a portion of the difference in estimates, given that Maritimers are known for consuming a higher than average amount of potatoes, and this study (BMR) would likely provide a better measure of regional differences. Based on a comparison of provincial and national data, N. B. consumption appears to be 8.5% higher than the national average.

Based on this information, the local market represents a total of 1,068,210 cwt of potatoes.

Once the size of the market is known, it is important to understand the role of competition in that market and the types of products the market buys. This information is presented in the following sections.

MARKET COMPETITION

A key element of this research effort was designed to provide information which would lead to a better understanding of what the consumer actually buys in the marketplace when they buy a particular potato product and why the consumer makes that choice. Therefore, each participant in this study was asked about a variety of product characteristics.

Most consumers do not seem to have a clear identification of the brands or varieties available. For example, when asked what variety of potatoes they purchased most often, 71% of the respondents did not name a variety. Among the balance (29%), the following varieties were mentioned: "whites", "russets" and "reds". No other variety was mentioned by more than one percent of the respondents.

Eighty-four percent of respondents did not mention a specific brand when asked which brand they purchased most often; in fact, the only brands recalled by more than 1% of respondents were PEI (mentioned by 6%) and NB potatoes (mentioned by 4%).

Respondents were also asked the following question:

> When you buy potatoes for your household , which potatoes do you buy most often...New Brunswick potatoes...PEI potatoes...or potatoes from another province or from the U.S.?

Table C-13 summarizes responses to this question within different areas of the province:

TABLE C-13
MARKET SHARE BY REGIONAL AREA

AREA	PERCENT PURCHASED		
	NB	PEI	COMBINATION
BATHURST-CAMPBELLTON	67%	25%	8%
CHATHAM	54%	27%	19%
EDMUNDSTON-WOODSTOCK	91%	3%	6%
FREDERICTON	47%	32%	21%
MONCTON	41%	40%	19%
SAINT JOHN	52%	35%	13%
ST. STEPHEN	58%	25%	17%

The information in Table C-13 suggests that significant market share has been lost to PEI growers in the major market areas of this province. As expected, the areas closest to the potato growing regions have the highest level of commitment to local producers.

As a part of understanding the differences in buying habits, each respondent was also asked to summarize their overall level of satisfaction with the products available in the different areas of the province. Table C-14 summarizes the perspectives on product quality in the different areas of the province.

TABLE C-14
LEVEL OF SATISFACTION BY REGIONAL AREA

AREA	LEVEL OF PRODUCT SATISFACTION			
	VERY SATISFIED	SOMEWHAT SATISFIED	SOMEWHAT DISSATIS.	VERY DISSATIS.
BATHURST-CAMPBELLTON	18%	72%	5%	5%
CHATHAM	15%	73%	12%	-
EDMUNDSTON-WOODSTOCK	14%	72%	11%	3%
FREDERICTON	25%	51%	19%	5%
MONCTON	18%	68%	12%	2%
SAINT JOHN	12%	60%	23%	2%
ST. STEPHEN	14%	79%	7%	-

From Table C-14 one can observe that the highest level of satisfaction with product quality is in the Fredericton area and the lowest level is in the Saint John area. This does not appear to be specifically linked to a New Brunswick-PEI situation. It may be a reflection of a difference in local stores or the quality of local growers.

Based on the information in Table C-14, most buyers seem at least somewhat satisfied with the product available in the marketplace.

The following material provides insight on differences seen by consumers regarding the NB-PEI products.

TABLE C-15
PRODUCT ATTRIBUTE COMPARISONS
NB-PEI POTATOES

PRODUCT CHARACTERISTICS	PERCENT SELECTING		
	NB	PEI	BOTH EQUALLY
Best Appearance	28%	49%	23%
Fewest Bruises	28%	48%	24%
Best Size and Shape	24%	49%	27%
Best Taste	34%	30%	36%
Best Packaging	21%	23%	57%
Best Prices	50%	18%	32%
Best Reputation:Quality	23%	69%	7%
Best Actual Quality	35%	50%	15%
Most Preferred by Respondent	50%	37%	13%

The information in this table suggests:

> that the New Brunswick consumer is discerning... s/he does see the difference between product image and the actual product. One might suggest that the 12% difference between actual and reputed quality might represent the impact of PEI's advertising program.

that PEI potatoes are seen as better in their physical attributes such as appearance and bruises, but they are not seen as significantly better in terms of taste or packaging.

that the New Brunswick advantage in the market place rests on two elements: price and local production. In both the survey and the focus groups, respondents and participants both cited the fact that they were supporting a local industry and that was a part of the basis for their buying decision.

that one should be cautious in assuming that local support would continue to be a motivation for buying if the price of the N.B. potato were the same as the PEI product. If the price were to increase and the quality of the potatoes were to stay at the same level, it would be logical to assume that PEI would gain an even larger share of the New Brunswick market.

The process of analysis provided the basis for these statements concerning prices. For example, among those who buy N.B. potatoes on a regular basis, 68% cited the fact that these had the best price; of those who bought PEI potatoes, 22% thought that N.B. had the best price, 36% thought PEI potatoes had the best price and 41% saw the price of the two as equal. This supports the idea that PEI may win a larger share of the market, if the price of N.B. potatoes were the same as PEI. This was also demonstrated in two of the focus groups. Participants said that they would chose the N.B. product because it was less expensive, when, in fact, it was the same price as the PEI product in the area where the group was held.

From this material one should be able to infer that PEI products do have an advantage in the market place in terms of reputation and appearance. However, the cost advantage of N.B. potatoes and the fact that it is produced locally gives New Brunswick an edge in the overall market.

Table C-16 summarizes the actual reported buying patterns of New Brunswick consumers on a province-wide basis:

TABLE C-16
BUYING PATTERNS OF NEW BRUNSWICK CONSUMERS

POTATOES PURCHASED	PERCENT OF HOUSEHOLDS
NEW BRUNSWICK	57%
PRINCE EDWARD ISLAND	28%
BOTH N.B. AND PEI	14%
OTHER AREAS	1%
	100%

Extrapolating from the information collected in this study a weighted average was developed projecting the market share for both New Brunswick and PEI. That weighted average share varied only slightly from the estimates provided in Table C-13: in a province-wide weighted average, based on the share within areas and the total population in each area, PEI is estimated to have approximately 25% of the N.B. market, N.B. has 58% of its local market and the balance, 17%, is shared by New Brunswick and PEI.

Using these figures, one could estimate that New Brunswick growers sell at least (58% of 1,068,210 cwt) 619, 562 cwt on the local market; that PEI sells at least (25% of 1,068,210 cwt) 267,053 cwt and that the two provinces share the balance of 181,595 cwt.

Estimates based on the annual Prince Edward Island potato disappearance figures through May, 1987 suggest that PEI has a somewhat larger share of the New Brunswick market given the fact that 431,052 cwt were shipped to this province. However, it is estimated that approximately 10-15% of those shipments were directly to the processing industry (leaving an estimate of 366,394 cwt sales of tablestock in New Brunswick). In actuality, if the 17% is allocated proportionally and the margin of error of ±5% is taken into account, these figures might be considered to be close to each other.

In essence, this data confirms that PEI supplies at least 30%, and perhaps 35%, of the total tablestock sales in this province.

Based on the information collected, those who buy PEI potatoes are more likely to do so because of the appearance of the product and the reputation for quality developed by PEI.

MARKET PRACTICES

In developing a plan to approach a market it is essential to understand some of the details of the actual product purchases. In this study each buyer was asked about their actual market purchases.

Each respondent was asked about the types of packages they purchased and their level of satisfaction with the packaging available.

TABLE C-17
TYPES OF POTATO PACKAGING

TYPE PURCHASED	PERCENT%
5lb. PAPER	7%
5lb. POLY	3%
10lb. PAPER	20%
10lb. POLY	11%
20lb. PAPER	15%
50lb. PAPER	38%
OTHER TYPES	6%
	100%

In this study 12% of the people survey and reported that they grew their own potatoes or that they purchased them directly from local farms.

When asked why they purchased a particular type, the most common response concerned the 50 lb. paper package which was purchased because it offered the least expensive product and because of the amount used in the household.

The following table summarizes the consumers' level of satisfaction with the packaging available:

TABLE C-18
CONSUMER SATISFACTION WITH PACKAGING

LEVEL OF SATISFACTION	PERCENT
VERY SATISFIED	24%
SOMEWHAT SATISFIED	70%
SOMEWHAT DISSATISFIED	4%
VERY DISSATISFIED	2%
	100%

Of those who expressed any dissatisfaction, the most commonly mentioned cause was the fact that the bags did not allow one to see the product. This problem was also confirmed through the focus groups. Each group discussed packaging and the major complaint concerned the lack of ability to view the product. Surprisingly, however, the immediate solution proposed was not the poly bag but a vented paper bag, perhaps because many seemed aware of the potential for damage to the product in poly bags. Participants repeatedly noted the problems in inconsistent sizing and the damaged potatoes - they simply want to see the product before the purchase.

When asked if they purchased washed or unwashed potatoes, 47% of the respondents reported that they usually purchased washed potatoes. They reported that the bought these because these potatoes are cleaner or easier to prepare. They bought unwashed because they were all that was available in their area, they were less expensive or easier to store.

Using this information, the ideal product for this market would appear to be a clean (washed or brushed) product in a vented paper bag.

FUTURE CONSUMPTION PATTERNS

Each respondent in these groups was asked about their future consumption of potatoes. The following table summarizes the information collected.

TABLE C-19
FUTURE POTATO CONSUMPTION TRENDS

LEVEL OF CONSUMPTION	PERCENT REPORTING
EXPECTED INCREASE	18%
EXPECTED DECREASE	28%
SAME LEVEL OF CONSUMPTION	54%
	100%

Among those who reported an expected increase or decrease in consumption, the most commonly cited reason concerned a change in the size of the family, not an actual change in eating patterns. It appears, as evidenced in the overall discussion of eating patterns, that people in this province continue to eat potatoes throughout their lives, it is only the household volume that changes. However, because this has been the way of the past, one should not assume that this will continue over time. If a market is to be expanded, it must be developed, new product uses and new product types should be developed. Those tasks and winning back the lost market share must become the challenges of people responsible for marketing New Brunswick potatoes.

PROMOTIONAL CONSIDERATIONS

Throughout this research effort it became increasingly clear that the major promotional efforts should not be directed at increasing the overall potato consumption because consumers may be near their maximum level of consumption of fresh potatoes. New opportunities do exist, but those lie within the realm of the processing sector.

Marketing activities should first be directed at increasing the quality of the product presentation in the market place. These efforts should be concerned with increasing the overall quality of the product and the presentation of that product in the marketplace.

Additional marketing efforts should also be directed at changing the image of the New Brunswick potato and all potatoes in terms of updating the consumers' perception and posing new means of use for the local consumer.

In the focus groups each participant was asked for suggestions to increase the likelihood that New Brunswickers would buy more locally grown products. The following comments summarize the suggestions made to increase consumer purchasing of N. B. potatoes. Those involved with the industry should...

.. prove that the New Brunswick potato is as good as any other product on the market...and promote that quality to consumers.

.. provide better displays and more promotion with stores.

.. provide recipes suggesting new ways of serving the product.

.. grade the potatoes so that what's in a pack is not a great surprise and is more consistent in overall size and appearance.

.. develop ads that make people think that good potatoes are grown in New Brunswick.

.. promote the idea of a locally grown product.

.. "give me some new ideas on how I can do different things with potatoes to make them more interesting for my family".

.. provide a package which allows the product to be visible....so the consumer can make an informed choice.

SUMMARY OF FOCUS GROUP IMPRESSIONS

Qualitative reaseach often increases the understanding of the material collected through quantitative research. In this project it was obvious that the discussion groups added depth to the understanding of people's eating patterns and to the consumer's view of the potatoes available in this province.

Several points should be made to summarize the observations drawn from the focus groups.

.. Each group confirmed the traditional eating pattern of New Brunswickers. A significant proportion of participants reported continuing consumption of 'traditional meals - the potatoes, carrots and meat or chicken" meals.

.. Most participants reported that women in the household continued to prepare most of the meals, that they spend about forty-five minutes preparing the main meals of the day and that this daily task is not usually considered an enjoyable experience.

.. Participants reported that the baked potato was the more modern type of potato serving...but that they did not bake potatoes on a regular basis and usually had not experimented with a variety of toppings or with such servings as "double-baked" potatoes.

.. People reported that they served boiled potatoes most often but they considered boiled potatoes as "boring" and they were interested in new product ideas (preparation and serving).

.. The most disturbing point concerning potatoes in the market place involved the poor ratings of the products available. The general impression from all the groups was that potatoes available were of fair to poor quality. People often mentioned the range of sizes in the bags and the problems with disease or damaged potatoes. They reported that they rarely returned a product, often because of the low price, but that they had threw out a significant amount of potatoes.

.. The problems with inconsistent size and quality led to the repeated mention of a need for a package which allowed the consumer to see at least a portion of the product. New Brunswick consumers did not necessarily seem to expect a plastic bag, perhaps because of the high proportion who are buying fifty pound packages, but they did stress the need for visibility.

.. Participants seemed evenly divided on the issue of the quality of the New Brunswick and PEI products. In general one was left with the distinct impression that New Brunswick would continue to have a larger share of the market because of the lower price (almost all consumers assumed that PEI had to be priced higher because of its quality image and this assumption may be causing some people to buy New Brunswick potatoes who would otherwise be buying PEI if they checked the prices). One also sensed that local production and the local resource or contribution to the economy contributed to a tempering of the negative reaction to the product: were the New Brunswick potatoes from another area one should expect a more negative reaction.

.. Based on a review of the discussions in the focus group, the research team is left with questions about the ability of the New Brunswick producers to maintain their share of the local market over the long term. Were, for example, the wholesalers and retailers interested in reducing the level of purchases of New Brunswick potatoes, they would only have to reduce their markups on PEI's product to see a significant change in buying behaviour. Were PEI growers able to set up a province-wide system within this province which competed with local deliveries and offered the same price as New Brunswick producers, New Brunswick producers would be facing serious difficulties.

.. The group discussions provided the best evidence of the effects of promotional/image advertising: consumers assume that PEI produces a quality product, they expect to pay more for that product, and they are willing to pay more. They key to the overall campaign has been for the industry in PEI to be able to deliver a product consistent with the advertising message and thus build a reputation in the marketplace. However, had the quality not been in place, the advertising campaign would not have been effective.

.. From the discussions one can conclude that local producers will be in a most difficult position if consumers were offered the same price for New Brunswick and PEI products. Over the long run, it would seem that failure to increase the quality of the potatoes and the packaging of the product will only signal an increase in the marketplace problems for New Brunswick producers.

SUMMARY OF THE CONSUMER STUDY

The preceding pages have provided a detailed discussion of the consumer's opinion of the New Brunswick potato offered to the market. The New Brunswick potato product has potential, but the first concern has to be the consistency of the quality available in the market place. The product has to be packaged in a way that is attractive to the consumer and offered to stores which are willing to adequately display the product. The product should be supported by intensive promotional efforts and advertisements directed at repositioning the New Brunswick product vis-a-vis the product from PEI in terms of overall image. The plan for promoting this product must, regardless of anything else, be based on the availability of a quality product in the market place.

APPENDIX A

RESP. £ (1-3)...___ ___ ___

COUNTY (4-5)...___ ___

Q.1 Altogether, how many years have you been involved in growing potatoes? (NOTE: IF ALL MY LIFE: and how long is that?)

ENTER NUMBER OF YEARS..............(6-7)....___ ___

D.K.......................................77

REFUSED...................................88

N.A.......................................98

Q.2 Are you currently farming on your own, in business with other members of your family or in some type of a partnership with any others?

ALONE..............................(8)......1

D.K..7 GO TO

REFUSED....................................8 Q.3

N.A..9

WITH ANY OTHERS............................2-----

Q.2A Because we only want to contact one person per farming operation, can you tell me the names of the other growers involved in your farm(IF NEEDED: any sons... or brothers or parents) ENTER NAMES ON SPACES BELOW AND REPORT TO SUPERVISOR AT END OF INTERVIEW:

____

____

Q.3 Altogether how many acres of potatoes are you planting this year?

ENTER NUMBER OF ACRES.............(9-12)....___ ___ ___ ___

D.K.......................................7777

REFUSED...................................8888

N.A.......................................9998

Q.3A Altogether, what percent of your total planted acreage do you own, as opposed to rent?

ENTER PERCENT....................(13-15)......___ ___ ___

D.K......................................997

REFUSED..................................998

N.A......................................999

Q.4 Altogether, how many barrels of potatoes did you produce last year? (IF R RESPONDS IN CWT DIVIDE CWT BY 1.65 TO GET NUMBER OF BARRELS)

ENTER TOTAL NUMBER (16-20) ___ ___ ___ ___ ___

D.K......................................77777

REF......................................88888

N.A......................................99999

Q.5 Thinking about the last five years.... has your overall potato acreage increased... stayed at the same level... or decreased?

STAYED THE SAME..................(21)..........3

D.K......................................7 GO

REF......................................8 TO

N.A......................................9 Q.6

INCREASED................................1

DECREASED................................2

Q.5A How many acres have you added to/subtracted from production over the last five years?

ENTER NUMBER OF ACRES..............(22-24)..___ ___ ___

D.K......................................777

REFUSED..................................888

N.A......................................998

NOT APPRO................................000

Q.6 Thinking about the next five years... do you plan to increase... maintain... or decrease the overall size of your acreage?

MAINTAIN	(25)	3	
D.K		7	GO
REF		8	TO
N.A		9	Q. 7
INCREASE		1	
DECREASE		2	

Q.6A Altogether, how many acres do you expect to add to/subtract from production over the next five years?

ENTER NUMBER OF ACRES	(26-28)	___ ___ ___
D.K		777
REFUSED		888
N.A		998
NOT APPROPRIATE		000

Now, turning to your current operations....

Q.7 Of your (READ NUMBER OF ACRES FROM Q.3) acres, what percent are or will be planted (READ EACH ITEM):

		PERCENT	DK	REF	NA
Q. 7a1 for the seed potato markets?	(29-31)	___ ___ ___	777	888	999
Q. 7a2 for the processing markets?	(32-34)	___ ___ ___	777	888	999
Q. 7a3 specifically for the tablestock markets	(35-37)	___ ___ ___	777	888	999
Q. 7a4 for something else? (What?______________________)	(38-40)	___ ___ ___	777	888	999

CHECK TOTAL = 100% AND CHECK SKIP SEQUENCE

SECTION A: SEED POTATO GROWERS--CHECK Q.7
IF NO POTATOES GROWN FOR THE SEED MARKET SHIP TO Q.8

Q.7A What varities make up the largest volumes of your seed potato crop? FOR THE FIRST FOUR VARIETIES ASK: Why do you plant (READ EACH VARIETY AND RECORD ANSWER)

Q7B1 VARIETY 1______________________________ (41-42)____ ____

Q7B2 WHY____

____(43-44)____ ___

Q7B3 VARIETY 2______________________________ (45-46)____ ____

Q7B4 WHY____

____(47-48) ___ ___

Q7B5 VARIETY 3______________________________ (49-50)____ ____

Q7B6 WHY____

____(51-52) ___ ___

Q7B7 VARIETY 4______________________________ (53-54)____ ____

Q7B8 WHY____

____(55-56)___ ___

Q.7C In an average year, what percent of your total crop is usually sold as seed potato?

ENTER PERCENT..........................(57-59)___ ___ ___

D.K...777

REF...888

NOT APPRO.......................................000

N.A...999

Q.7D In an average year do you usually sell your seed potatoes to a shipper..to a broker or an exporter...do you market your own seed potatoes or what?

SELL ONLY TO A SHIPPER........................(60).....1
SELL ONLY TO A BROKER/EXPORTER........................2
D.K...7 GO TO
REFUSED/N.A...8 Q.7F
MARKETS HIS OWN 3
MARKETS HIS OWN AND SOMETHING ELSE....................4

Approximately what percent of your seed potatoes are sold...		PERCENT	DK	REF	NA	NOT APP
Q.7E1 within New Brunswick?	(61-63)	___ ___ ___	777	888	999	000
Q.7E2 to other provinces?	(64-66)	___ ___ ___	777	888	999	000
Q.7E3 on the U.S. Market	(67-69)	___ ___ ___	777	888	999	000
Q.7E4 on the off shore market	(70-72)	___ ___ ___	777	888	999	000

7.F In general, would you say that you are very satisfied... somewhat satisfied... somewhat dissatisfied... or very dissatisfied with the price you receive for your seed potatoes?

VERY SATISFIED.....................(73).......1
SOMEWHAT SATISFIED...........................2
SOMEWHAT DISSATISFIED........................3
VERY DISSATISFIED............................4
DK...7
REF..8
NA...9
NOT APPRO....................................0

Q.7G What problems, if any, have you had in trying to sell your seed potatoes (IF PRICE: CODE AND PROBE FOR SECOND MENTION)

____

____

____(74-75)___ ___

NONE.....................................75

D.K......................................77

REF/NA...................................88

NOT APPRO................................98

SECTION B: QUESTIONS FOR GROWERS PRODUCING FOR THE PROCESSING MARKETS CHECK Q.7 AND IF NONE PLANTED SKIP TO Q.9A

CARD 2
RESP NO. (1-3)... __ __ __

Q.8A What varities make up the largest volumes of your processing crop? FOR THE FIRST FOUR VARIETIES ASK: Why do you plant (READ EACH VARIETY AND RECORD ANSWER)

Q8A1 VARIETY 1__________________________ (4-5)____ ____

Q8A2 WHY____

____ (6-7) ___ ___

Q8A3 VARIETY 2__________________________ (8-9)____ ____

Q8A4 WHY____

____ (10-11)___ ___

Q8A5 VARIETY 3__________________________ (12-13)___ ____

Q8A6 WHY____

____(14-15)___ ___

Q8A7 VARIETY 4__________________________ (16-17)___ ____

Q8A8 WHY____

____(18-19)___ ___

Q.8B In an average year, what percent of your total crop is usually sold to processors?

ENTER PERCENT...............................(20-22)___ ___ ___

D.K..777

REF..888

NOT APPRO..000

N.A..999

Q.8C Approximately what percent of your overall crop of processing potatoes are sold

		PERCENT	DK	REF	NA	NOT APP
Q.8C1 within New Brunswick?	(23-25)	___ ___ ___	777	888	999	000
Q.8C2 in Ontario?	(26-28)	___ ___ ___	777	888	999	000
Q.8C3 in Quebec?	(29-31)	___ ___ ___	777	888	999	000
Q.8C4 to other provinces?	(32-34)	___ ___ ___	777	888	999	000
Q.8C5 on the U.S. Market?	(35-37)	___ ___ ___	777	888	999	000

8.D In general, would you say that you are very satisfied... somewhat satisfied... somewhat dissatisfied... or very dissatisfied with the price you receive for your processing potatoes?

VERY SATISFIED........................(38)......1

SOMEWHAT SATISFIED.............................2

SOMEWHAT DISSATISFIED..........................3

VERY DISSATISFIED..............................4

DK...7

REF..8

NA...9

NOT APPRO......................................0

Q.8E What problems, if any, have you had in trying to sell your processing potatoes (IF PRICE: CODE AND PROBE FOR SECOND MENTION)

____

____(39-40) ___ ___

NONE	75
D.K	77
REF/NA	88
NOT APPRO	98

SECTION C FOR GROWERS OR SELLERS OF TABLESTOCK POTATOES: CHECK Q.7 FOR GROWING AND ASK Q9A TO DETERMINE APPROPRIATENESS OF THIS SECTION.

Q.9A In an average year, what percent of your total output is usually sold as tablestock potato?

ENTER PERCENT	(41-43)___ ___ ___
D.K	777
REF	888
NOT APPRO	000
N.A	999

IF NONE PLANTED OR SOLD SKIP TO Q.16 PAGE 15

Q.9B What varieties make up the largest volume of your tablestock sales? FOR THE FIRST FOUR VARIETIES ASK: Why do you sell a lot of (READ EACH VARIETY AND POST ANSWER)

Q9B1 VARIETY________________________________ (44-45)____ ____

Q9B2 WHY____

____(46-47)___ ___

Q9B3 VARIETY________________________________ (48-49)____ ____

Q9B4 WHY____

____(50-51)___ ___

Q9B5 VARIETY________________________________ (52-53)____ ____

Q9B6 WHY____

____(54-55)___ ___

Q9B7 VARIETY________________________________ (56-57)____ ____

Q9B8 WHY____

____(58-59)___ ___

Q.9C When you sell your tablestock potatoes, do you sell any to shippers?

YES..............................(60)......1

NO...2 GO TO

D.K..7 Q.10

REF..8 P.10

NA...9

NOT APPR...................................0

Q.9D On average, about what percent of your overall production of tablestock potatoes do you sell to shippers?

ENTER PERCENT..................(61-63)...___ ___ ___

D.K......................................777

REFUSED..................................888

N.A......................................998

NOT APPR.................................000

Q.9E In general, do you pack most of the potatoes that you sell to shippers or do you sell in bulk?

IN BULK..............................(64).......2

D.K.....................................7

REFUSED.................................8 GO TO Q.9G

N.A.....................................9

NOT APPRO...............................0

PACK....................................1

BOTH....................................3

Q.9F Do you sell any (READ EACH TYPE) to shippers?

			YES	NO	DK	REF	NA	NOT.A
Q9F1	5£ poly bags	(65)	1	2	7	8	9	0
Q9F2	10£ poly bags	(66)	1	2	7	8	9	0
Q9F3	5£ paper bags	(67)	1	2	7	8	9	0
Q9F4	10£ paper bags	(68)	1	2	7	8	9	0
Q9F5	50£ paper bags	(69)	1	2	7	8	9	0
Q9F6	count boxes	(70)	1	2	7	8	9	0
Q9F7	other pack?	(71)	1	2	7	8	9	0

(SPECIFY)____________________

Q.9G In general do you sell to several different shippers, to just a few shippers, or what?

VARIETY...........................(72).......1

JUST A FEW..................................2

OTHER (SPECIFY)___________________________......3

D.K...7

REFUSED.....................................8

N.A...9

NOT APPRO...................................0

CARD 3
RESP. NO (1-3) ___ ___ ___

Q.9H Would you say that you have been dealing with the same shippers for three years or more or do you deal with different shippers each year?

THREE YEARS OR MORE	(4)	1
CHANGE REGULARLY		2
OTHER (SPECIFY) ______________________________		3
D.K		7
REFUSED		8
N.A		9
NOT APPRO		0

Q.9I In general, would you say that you are very satisfied... somewhat satisfied... somewhat dissatisfied... or very dissatisfied with the price you receive from shippers?

VERY SATISFIED	(5)	1
SOMEWHAT SATISFIED		2
SOMEWHAT DISSATISFIED		3
VERY DISSATISFIED		4
DK		7
REF		8
NA		9
NOT APPRO		0

Q.9J In general, would you say that you have an excellent... good... fair... or poor business relationship with the shippers?

EXCELLENT..............................(6).....1 GO TO

GOOD..2

OTHER (SPECIFY)_________________________________ Q.10

____5

DK..7

REF...8

NA..9

NOT APPRO.....................................0

FAIR..3

POOR..4

Q.9K What in particular makes you say that you have a fair/poor business relationship with shippers? (RECORD EXACTLY)

____

____(7-8)..___ ___

D.K...77

REFUSED.......................................88

N.A...98

NOT APPRO.....................................00

Q.10 When you sell your tablestock potatoes, do you sell any potatoes to wholesalers?

YES............................(9)........1

NO..2 GO TO

D.K...7 Q.11

REF...8

NA..9

NOT APPRO.....................................0

Q.10A On average, about what percent of your overall production of tablestock potatoes do you sell to wholesalers?

ENTER PERCENT.....................(10-12)...___ ___ ___

D.K......................................777

REFUSED..................................888

N.A......................................998

NOT APPRO................................000

Q.10B In general, do you pack most of the potatoes that you sell to wholesalers or do you sell in bulk?

IN BULK..........................(13)........2

D.K..7 GO TO

REFUSED......................................8 Q.10D

N.A..9

NOT APPRO....................................0

PACK...1

BOTH...3

Do you sell any (READ EACH TYPE) to wholesalers?

			YES	NO	DK	REF	NA	NOT.A
Q10C1	5£ poly bags	(14)	1	2	7	8	9	0
Q10C2	10£ poly bags	(15)	1	2	7	8	9	0
q10C3	5£ paper bags	(16)	1	2	7	8	9	0
Q10C4	10£ paper bags	(17)	1	2	7	8	9	0
Q10C5	50£ paper bags	(18)	1	2	7	8	9	0
Q10C6	count boxes	(19)	1	2	7	8	9	0
Q10C7	other pack?	(20)	1	2	7	8	9	0

(SPECIFY)____________________

Q.10D Would you say that you have been dealing with the same wholesalers for three years or more, or do you deal with different wholesalers each year?

THREE YEARS OR MORE.................(21)........1

CHANGE REGULARLY................................2

OTHER (SPECIFY)________________________________...3

D.K...7

REFUSED...8

N.A...9

NOT APPRO.......................................0

10.E In general, would you say that you are very satisfied... somewhat satisfied... somewhat dissatisfied... or very dissatisfied with the price you receive from wholesalers?

VERY SATISFIED....................(22)......1

SOMEWHAT SATISFIED..........................2

SOMEWHAT DISSATISFIED.......................3

VERY DISSATISFIED...........................4

DK..7

REF...8

NA..9

NOT APPRO...................................0

10.F In general, would you say that you have an excellent... good... fair... or poor business relationship with the wholesalers?

EXCELLENT.........................(23)......1

GOOD..2 GO

OTHER (SPECIFY)_____________________________

____5 TO

DK..7 Q.11

REF...8

NA..9

NOT APPRO...................................0

FAIR..3

POOR..4

Q.10G What in particular makes you say that you have a fair/poor business relationship with wholesalers? (RECORD EXACTLY)

____

____(24-25) ___ ___

D.K...77

REFUSED.....................................88

N.A...98

NOT APPRO...................................00

Q.11 When you sell your tablestock potatoes, do you sell any potatoes directly to grocery or convenience stores or other types of retailers?

YES............................(26).......1

NO..2 GO TO

D.K...7 Q.12

REF...8

NOT APPRO...................................9

Q.11a On average, about what percent of your overall production of tablestock potatoes do you sell to retailers?

ENTER PERCENT..................(27-29)...___ ___ ___

D.K...777

REFUSED.....................................888

N.A...998

NOT APPRO...................................000

Q.11b In general, do you sell to a variety of retailers, to just a few retailers, or what?

VARIETY........................(30)........1

JUST A FEW..................................2

OTHER (SPECIFY)______________________________...3

D.K...7

REFUSED.....................................8

N.A...9

NOT APPRO...................................0

Do you sell any (READ EACH TYPE) to retailers?

			YES	NO	DK	REF	NA	NOT.A
Q11C1	5£ poly bags	(31)	1	2	7	8	9	0
Q11C2	10£ poly bags	(32)	1	2	7	8	9	0
Q11C3	5£ paper bags	(33)	1	2	7	8	9	0
Q11C4	10£ paper bags	(34)	1	2	7	8	9	0
Q11C5	50£ paper bags	(35)	1	2	7	8	9	0
Q11C6	count boxes	(36)	1	2	7	8	9	0
Q11C7	other pack?	(37)	1	2	7	8	9	0

(SPECIFY)____________________

Q.11D Would you say that you have been dealing with the same retailers for three years or more, or do you deal with different retailers each year?

THREE YEARS OR MORE.................(38)........1
CHANGE REGULARLY.................................2
OTHER (SPECIFY)..................................3
D.K..7
REFUSED..8
N.A..9
NOT APPRO..0

Q.11E In general, would you say that you are very satisfied... somewhat satisfied... somewhat dissatisfied... or very dissatisfied with the price you receive from retailers?

VERY SATISFIED......................(39).....1
SOMEWHAT SATISFIED..........................2
SOMEWHAT DISSATISFIED.......................3
VERY DISSATISFIED...........................4
DK..7
REF...8
NA..9
NOT APPRO...................................0

Q11.F In general, would you say that you have an excellent... good... fair... or poor business relationship with the retailers?

EXCELLENT................................(40)...1

GOOD...2 GO TO

OTHER (SPECIFY)________________________________ Q. 12

____5

DK...7

REF..8

NA...9

NOT APPRO....................................0

FAIR...3

POOR...4

Q.11G What in particular makes you say that you have a fair/poor business relationship with retailers? (RECORD EXACTLY)

____

____(41-42)___ ___

D.K...77

REFUSED.....................................88

N.A...98

NOT APPRO...................................00

Q.12 When you sell your tablestock potatoes, do you sell any potaotes directly to the consumer at your farm or at farm markets?

YES......................................(43)....1

NO...2 GO TO

D.K..7 Q.13

REF..8

N.A..9

NOT APPRO....................................0

Q.12a On average, about what percent of your overall production of tablestock potatoes do you sell directly to consumers at the farm or at farm markets?

ENTER PERCENT....................(44-46)...___ ___ ___

D.K....................................777

REFUSED................................888

N.A....................................998

NOT APPRO..............................000

Q.12B What probelems, if any, have you had in trying to sell your tablestock potatoes directly to consumers?
(IF PRICE: RECORD AND PROBE FOR SECOND MENTION)

____

____

____(47-48)___ ___

NONE...................................75

D.K....................................77

REF/NA.................................88

NOT APPRO..............................98

Q.13 What percent of your tablestock potatoes actually go through a washline?

ENTER PERCENT....................(49-51)..___ ___ ___

D.K....................................777

REFUSED................................888

N.A....................................998

NOT APPRO..............................000

IF "NONE", GO TO Q.14

Q.13A On average, what percent of your tablestock are graded out or rejected by the washline operation?

ENTER PERCENT......................(52-54).. ___ ___ ___

D.K.......................................777

REFUSED...................................888

N.A.......................................998

NOT APPRO.................................000

Q.14 What percent of your tablestock potatoes are brushed?

ENTER PERCENT......................(55-57).. ___ ___ ___

D.K.......................................777

REFUSED...................................888

N.A.......................................998

NOT APPRO.................................000

IF "NONE", GO TO Q.15

Q.14A On average, what percent of your tablestock are graded out or rejected by brushing?

ENTER PERCENT......................(58-60).. ___ ___ ___

D.K.......................................777

REFUSED...................................888

N.A.......................................998

NOT APPRO.................................000

DO NOT ASK IF POTATOES SOLD ONLY TO A SHIPPER

Q.15 Approximately (REPEAT POINT) what percent of your tablestock potatoes are sold ...

		PERCENT	DK	REF	NA	NOT APP
Q.15A to the New Brunswick market?	(61-63)	___ ___ ___	777	888	999	000
Q.15B to the Ontario market?	(64-66)	___ ___ ___	777	888	999	000
Q.15C to the Quebec markets?	(67-69)	___ ___ ___	777	888	999	000
Q.15D to other provinces?	(70-72)	___ ___ ___	777	888	999	000
Q.15E in the U.S. Market?	(73-75)	___ ___ ___	777	888	999	000
Q.15F in the off-shore market?	(76-78)	___ ___ ___	777	888	999	000

ASK OF ALL

CARD 4
RESP. NO. (1-3) __ __ __

Q.16 Thinking about your overall farming operation, would you say that the tablestock market is very important... somewhat important... not very important... or not at all important to your operation?

VERY IMPORTANT..........................(4).....1

SOMEWHAT IMPORTANT...............................2

NOT VERY IMPORTANT...............................3

NOT AT ALL IMPORTANT.............................4

D.K..7

REFUSED..8

N.A..9

Q.17 Thinking about the overall New Brunswick potato industry, would you say that the tablestock market is very important... somewhat important not very important or not at all important to the New Brunswick potato industry?

VERY IMPORTANT..........................(5).....1

SOMEWHAT IMPORTANT..............................2

NOT VERY IMPORTANT..............................3

NOT AT ALL IMPORTANT............................4

D.K...7

REFUSED...8

N.A...9

Q.18 Thinking about the overall marketing of your potatoes, would you say that you are very satisfied...somewhat satisfied... somewhat dissatisfied...or very dissatisfied with the ways in which you are able to sell your potatoes?

VERY SATISFIED........................(6)....1

SOMEWHAT SATISFIED............................2

SOMEWHAT DISSATISFIED.........................3

VERY DISSATISFIED.............................4

D.K...7

REFUSED.......................................8

N.A...9

Q.19 In general would you say that you are very satisfied... somewhat satisfied... somewhat dissatisfied or very dissatisfied with the prices you've been receiving for your potatoes?

VERY SATISFIED.................(7)..........1

SOMEWHAT SATISFIED...........................2

SOMEWHAT DISSATISFIED........................3

VERY DISSATISFIED............................4

D.K..7

REF..8

N.A..9

Q.20 In thinking about the overall system for marketing your potatoes, what one thing, other than the price you receive, would you like to see changed?

____

____

____(8-9) ____ ____

D.K.....................................77

REFUSED.................................88

N.A.....................................99

Q.21 In thinking about the marketing of your potatoes, which type of market would you most prefer to supply---the seed, processing or tablestock market?

SEED...........................(10-11).....11

PROCESSING..............................12

TABLESTOCK..............................13

COMBINATION.............................14

D.K.....................................77

REFUSED.................................88

N.A.....................................99

Q.21a What, in particular, makes you choose that/those market(s) for your potatoes? (RECORD EXACT)

____

____

____(12-13)...____ ____

D.K.....................................77

REFUSED.................................88

N.A.....................................99

Q.22 Based on your experience, would you say that knowing about consumer attitudes and tastes is very important, somewhat important or not very important to most growers of tablestock potatoes?

VERY IMPORTANT....................(14)......1

SOMEWHAT IMPORTANT..........................2

NOT VERY IMPORTANT..........................3

D.K...7

REFUSED.....................................8

N.A...9

Q.23 How about you personally, are the attitudes of consumers of potatoes very important, somewhat important or not very important to you when you are deciding what varieties to plant?

VERY IMPORTANT....................(15).....1

SOMEWHAT IMPORTANT..........................2

NOT VERY IMPORTANT..........................3

D.K...7

REFUSED.....................................8

N.A...9

Q.24 In general, would you say that you are very aware, somewhat aware or not very aware of what consumers think about potatoes and competing products?

VERY AWARE........................(16)......1

SOMEWHAT AWARE..............................2

NOT VERY AWARE..............................3

D.K...7

REFUSED.....................................8

N.A...9

Q.25 In general, how do you think consumers would rate the quality of New Brunswick potatoes available to them in the marketplace. Would consumers say that New Brunswick tablestock potatoes are excellent... good... fair... or poor?

EXCELLENT	(17)	1
GOOD		2
FAIR		3
POOR		4
DK		7
REF		8
NA		9
NOT APPRO		0

Q.26 How about your rating... would you say that the New Brunswick tablestock potatoes made available to New Brunswick consumers are excellent... good... fair... or poor?

EXCELLENT	(18)	1
GOOD		2
FAIR		3
POOR		4
DK		7
REF		8
NA		9
NOT APPRO		0

Now, we want to ask just a few questions about the business side of your farm......

Q. 27 Based on your experience, what would you say is your average cash cost to produce an acre of potatoes?

ENTER AMOUNT	(19-22)	__ __ __ ___
D.K		9997
REFUSED		9998
N.A		9999

Q. 28 Based on your experience, what would you say is your total cost (including depreciation), on average, to produce an acre of potatoes?

ENTER AMOUNT....................(23-26)___ ___ ___ ___

D.K......................................9997

REFUSED..................................9998

N.A......................................9999

Q. 29 In an average year, what percent of your total crop is either sold or contracted by December 31st ?

ENTER AMOUNT.....................(27-29)__ ___ ___

D.K..................................777

REFUSED..............................888

N.A..................................999

Q. 30 In an average year, what percent of your total crop is either sold or contracted by April 30th ?

ENTER AMOUNT.....................(30-32)__ ___ ___

D.K..................................777

REFUSED..............................888

N.A..................................999

Q.31 Who maintains the business records for your operation.. you personally, someone else in your household, an accountant or what?

GROWER PERSONALLY.................(33)...1

OTHERS IN HOUSEHOLD......................2

ACCOUNTANT...............................3

OTHER....................................4

D.K......................................7

REFUSED..................................8

N.A......................................9

Q.32 Are your business records maintained on computer?

YES	(34)	1	
NO		2	
D.K		7	
REFUSED		8	
N.A		9	

Q.33 Are you currently involved in any other type of farming or growing operation?

NO	(35)	2	GO TO Q.34
D.K		7	
REF		8	
N.A		9	
NOT APPRO		0	
YES		1	

Q.33A In what other types of agriculture are you involved?

____

____(36-37)..___ ___

D.K	77
REF	88
NOT APPRO	00
N.A	99

To end our survey, we'd like to get your opinions on some issues of concern to the industry as a whole:

Q.34 In general, would you say that the overall quality of potatoes grown in New Brunswick is excellent... good... fair... or poor?

EXCELLENT	(38)	1
GOOD		2
FAIR		3
POOR		4
D.K		7
REF		8
N.A		9

Q.35 In general, would you say that the provincial department of agriculture has done an excellent... good... fair... or poor job of assisting the development of the potato industry in this province?

EXCELLENT	(39)	1
GOOD		2
FAIR		3
POOR		4
D.K		7
REF		8
N.A		9

Q.36 In general, would you say that Agriculture Canada has done an excellent... good... fair... or poor job of assisting the development of the potato industry in this province?

EXCELLENT	(40)	1
GOOD		2
FAIR		3
POOR		4
D.K		7
REF		8
N.A		9

Q.37 In general, would you say that the Potato Agency has done an excellent... good... fair... or poor job of representing the interests of the potato growers in this province?

EXCELLENT........................(41)......1

GOOD..2

FAIR..3

POOR..4

D.K...7

REF...8

N.A...9

Q.38 Would you favour or would you oppose changes to allow shippers to become members of the board of the Potato Agency?

FAVOUR...........................(42)......1

OPPOSE......................................2

NO OPINION..................................3

D.K...7

REF...8

N.A...9

Q.39 In general, do you favour or would you oppose the idea of establishing inspection procedures for tablestock potatoes sold within New Brunswick?

FAVOUR.............................(43)....1

OPPOSE......................................2

NO OPINION..................................3

D.K...7

REF...8

N.A...9

Q.40 If inspection standards were put in place for potatoes sold on the New Brunswick tablestock market who should supervise the inspection...the federal government...the provincial government...the Potato Agency, some other groups or organization(what is that) or what?

FEDERAL GOVERNMENT...............(44)........1

PROVINCIAL GOVT..............................2

POTATO AGENCY................................3

OTHER(SPECIFY ________________________).....4

D.K..7

REF..8

N.A..9

Q.41 At this point in time do you favour or do you oppose the establishment of a National Potato Agency?

FAVOUR............................(45)......1

OPPOSE.......................................2

NO OPINION...................................3

D.K..7

REF..8

N.A..9

Q.42 If a national potato agency were established, do you think that New Brunswick growers would be better off, stay about the same or be worse off than they are today?

BETTER OFF........................(46).....1

THE SAME.....................................2

WORSE OFF....................................3

NO OPINION...................................4

D.K..7

REF..8

N.A..9

Q.43 What would be the major advantage of a national agency for the New Brunswick potato industry?

____

____(47-48)___ ___

D.K......................................77

REF......................................88

N.A......................................99

Q.44 What would be the major disadvantage of a national agency for the New Brunswick potato industry?

____

____(49-50)___ ___

D.K......................................77

REF......................................88

N.A......................................99

Q.45 Based on your experience, what is the major problem facing the New Brunswick potato grower today?

____

____(51-52)___ ___

D.K......................................77 GO

REF......................................88 TO

N.A......................................99 END

Q.46 Looking ahead five years, do you think that the industry will be able to solve the problems associated with (READ MENTION IN Q. 46)...IF YES: how will it be solved....IF NO..why won't the problem be solved?

____

____(53-54)___ ___

D.K......................................77

REF......................................88

N.A......................................99

THANK AND END

NOTE LENGTH OF INTERVIEW......(55-56) ___ ___

In this questionnaire we need to ask you questions about food for the whole family...therefore, I do want to first ask: altogether, how many people including yourself live live in your household?

NUM (1-2) ___ ___

IF MORE THAN ONE USE "FAMILY" THROUGHOUT THE SURVEY

IF SINGLE PERSON USE 'YOU'.

RESP (3-6)___ ___ ___ ___

TEL (7-9) ___ ___ ___

Q.1 First of all we want to ask you a few questions about the types of foods you/your family eat(s) today compared to two years ago.....would you say that you (and your family) are eating more...less or about the same amount of (READ EACH FOOD GROUP)today ...as you were two years ago?

			MORE	LESS	SAME	DK/REF/NA
1A.	beef?	(10)	1	2	3	9
1B	rice	(11)	1	2	3	9
1C.	chicken?	(12)	1	2	3	9
1D	potatoes?	(13)	1	2	3	9
1E	pasta	(14)	1	2	3	9
1F.	pork?	(15)	1	2	3	9
1G	fish	(16)	1	2	3	9
1H	salads?	(17)	1	2	3	9
1I	vegetables?	(18)	1	2	3	9

INTERVIEWER: REFER TO Q.1
IF RESPONDENT IS EATING LESS/MORE POTATOES TODAY THAN PREVIOUSLY:

Q.2 What would you say is the major reason that you/your family is/are eating less/more potatoes today?

____

____...(19-20) ___ ___

NO SPECIAL REASON	75
D.K	77
REFUSED	88
N.A	98
NOT APPRO	00

INTERVIEWER: REFER TO Q.1

IF RESPONDENT IS EATING LESS/MORE RICE TODAY THAN PREVIOUSLY:

Q.3 What would you say is the major reason that you/your family are/is eating less/more rice today?

____

____...(21-22) ___ ___

NO SPECIAL REASON	75
D.K	77
REFUSED	88
N.A	98
NOT APPRO	00

INTERVIEWER: REFER TO Q.1
IF RESPONDENT IS EATING LESS/MORE PASTA TODAY THAN PREVIOUSLY:

Q.4 What would you say is the major reason that you/your family are/is eating less/more pasta today?

____

____...(23-24) ___ ___

NO SPECIAL REASON	75
D.K	77
REFUSED	88
N.A	98
NOT APPRO	00

Q.5 Now, we'd like to ask you a few questions about the foods you (and your family) eat in an average week at the main meal of the day... but I first need to ask when you have your main meal each day..do you eat the main meal at noontime or in the evening at supper/dinnertime?

NOON	(25)	1
EVENING		2
ALTERNATES		3
DK/REF/NA		9

Q.6 Now, thinking about the seven main meals in a week....(REPEAT POINT) on average, at how many of those seven main meals are (READ EACH ITEM)....served

		NUMBER	DK.REF.NA
6A some type of potatoes	(26)	____	9
6B some type of rice	(27)	____	9
6C some type of pasta	(28)	____	9

IF NO POTATOES SERVED GO TO Q. 8

Q.7 When potatoes are served at the main meal of the day...which type of potatoes are served most often.. boiled.... baked...mashed...hash browns....french fries ...scalloped...or some other type(what type is that?)

BOILED....................................(29)...1

BAKED..2

MASHED...3

HASH BROWNS..4

SCALLOPED..5

FRENCH FRIES.......................................6

OTHER______________________________................7

D.K./REF/N.A/NOT APPRO.............................9 GO TO Q 8

Q.7a Why are (READ CHIOCE FROM Q.7) served most often?

____

____..(30-31)..___ ___

NOTHING IN PARTICULAR..............................75

D.K./REFUSED.......................................99

NOT APPRO..00

IF NO RICE SERVED (Q.6) GO TO Q. 9.

Q.8 For those main meals at which rice is served...
which type of rice is served most often...white ....
...brown or some form of packaged or prepared rice or what?

WHITE..(32)...1

BROWN..2

PACKAGED/SEASON..3

OTHER..7

D.K./REF/N.A/NOT APPRO.................................9 GO TO Q.9

Q.8A Why is (READ RESPONSE IN Q.9) served most often?

____

____..(33-34)..___ ___

NOTHING IN PARTICULAR.................................75

D.K./REFUSED..99

NOT APPRO...00

Q.9 Now, I'd like to ask about the breakfasts in your home
..in general, about how many days of the week are breakfasts
prepared?

ENTER NUMBER..............(35)... ____

DK/REFUSED/NA......................9

IF NO BREAKFASTS GO TO Q.10

Q.9A Thinking about the (READ NUMBER FROM Q.9) days on which
breakfasts are prepared... how many days, on average,
are potatoes served with breakfast?

NUMBER SERVED.............(36)...___

DK/REF/NA/NOT APPRO...............9

IF NONE SERVED GO TO Q.10

Q.9B Which types of potatoes are served most often
at breakfasts in your home? (PROBE IF VARIETY MENTIONED)

HOME FRIES/HASH BROWNS....(37)....1

FRENCH FRIES......................2

OTHER(SPECIFY___________________)..3

DK/REF/NA/NOT APPRO...............9

Q.10 Now, I'd like to ask about the lunches or light meals served in your home. In an average week... about how many days per week are lunches/lightmeals prepared in your home?

ENTER NUMBER..............(38-39) ____

DK/REFUSED/NA......................9

IF NO LIGHT MEALS GO TO Q.12

Q.10A Thinking about the (READ NUMBER FROM Q.10) days when lunches are prepared for your household, how many days, on average, are some form of potatoes served?

NUMBER SERVED.............(40)...___

DK/REF/NA/NOT APPRO...............9

IF NONE GO TO Q.11

Q.10B Which types of potatoes are served most often at lunches in your home?

BOILED....................(41).....1

BAKED..............................2

MASHED.............................3

FRENCH FRIES.......................4

OTHER(SPECIFY ____________________)...5

DK/REF/NA/NOT APPRO................9

Q.11 Thinking about the (READ NUMBER FROM Q.10A) days on which lunches are prepared for your household, at how many lunches, on average, would rice be served?

NUMBER SERVED.............(42)...___

DK/REF/NA.........................9

IF NONE SERVED GO TO Q.12

Q.11A When rice is served at lunch in your home which type of rice is served most often?

WHITE.....................(43)....1

BROWN.............................2

FRIED.............................3

PREPARED/PACKAGED.................4

OTHER(SPECIFY ____________________)..5

DK/REF/NA/NOT APPRO...............9

Q.12 Next, we'd like to have you tell us which type of product - rice...potatoes...or pasta -- best answers each of the following questions (READ EACH QUESTION FOLLOWED BY:) rice...potatoes...pasta?

		POTATOES	RICE	PASTA	COMBO	DK/REF
Q12A which product has the best nuritional value..	(44)	1	2	3	4	9
Q12B which product has the best overall taste	(45)	1	2	3	4	9
Q12C which product has the best value for the money.....	(46)	1	2	3	4	9
Q12D which product is the one most preferred by you/your family.....	(47)	1	2	3	4	9
Q12E which product can be served in the widest variety of ways	(48)	1	2	3	4	9
Q12F which product goes best with chicken	(49)	1	2	3	4	9
Q12G which product goes best with beef...........	(50)	1	2	3	4	9
Q12H which product goes best with fish...	(51)	1	2	3	4	9
Q12I which product goes best with pork...........	(52)	1	2	3	4	9
Q12J which product seems to go the best with the types of meals you and your family are eating today...	(53)	1	2	3	4	9
Q12K which of these products is the most convenient to prepare...	(54)	1	2	3	4	9
Q12L which of these products is lowest in calories..................	(55)	1	2	3	4	9
Q12M which of these products seems most appropriate for today's eating style......................	(56)	1	2	3	4	9

Now, we'd like to ask you a few brief questions about purchasing these products....

Q.13 Altogether, about how cups of rice does your (do you) family eat in a typical week?

ENTER CUPS....................(57-58)___ ___

D.K/REF/N.A.............................99

Q.14 When you buy potatoes, what type of package do you buy most often....(READ EACH CHOICE).

a five pound paper bag............(59).....1

a five pound plastic bag...................2

a ten pound paper bag......................3

a ten pound plastic bag....................4

a twenty pound paper bag...................5

a fifty pound paper bag....................6

individually foil-wrapped bakers...........7

loose or unwrapped potatoes?...............8

or something else(SPECIFY______________....0

DK/REF/NA/.................................9

IF NONE BOUGHT OR GROW ALL OF THEIR OWN THEN ASK Q.15 AND GO TO Q.25

Q.14A What, in particular, makes you buy most of your potatoes in (READ CHOICE IN Q.15)?

____

____(60-61) ___ ___

NO SPECIAL REASON..........................22

D.K./REF/NA................................99

Q.14B In general would you say that you are very satisfied...somewhat satisfied...somewhat dissatisfied...or very dissatisfied with the potato packaging available here in New Brunswick?

VERY SATISFIED..................(62)...........1 GO TO

SOMEWHAT SATISFIED.............................2 Q.15

DK/REF/NA......................................9

SOMEWHAT DISSATISFIED..........................3

VERY DISSATISFIED..............................4

Q.14C Why are you dissatisfied with the potato packaging available in New Brunswick?

____

____(63-64) ___ ___

D.K..77

REF/NA/NOT APPRO...............................99

Q.15 Altogether, about how many pounds of potatoes does your family/do you eat, not including any frozen or instant potatoes, in a typical week?

ENTER POUNDS..................(65-66)___ ___

D.K/REF/N.A...........................99

Q. 16 When you buy your potatoes is there any particular variety or type of potato that you buy more than others, such as round whites, russets, reds or something else.

____(67-68) ___ ___

NO PARTICULAR VARIETY.....................75

GO TO

D.K./NA/REF...............................99

Q.17

Q.16A What, in particular, makes you want to buy more (READ MENTION IN Q.17) than other types or varieties?

____(69-70) ___ ___

NO PARTICULAR REASON......................75

D.K./NA/REF/NOT APPRO.....................99

Q. 17 When you buy your potatoes is there any particular brand that you buy more than others (IF YES Which brand is that?)

____(71-72) ___ ___

NO PARTICULAR BRAND........................75 GO TO

D.K./NA/REF................................99 Q.18

Q.17A What, in particular, makes you want to buy that brand more than any other?

____(73-74) ___ ___

NO PARTICULAR REASON.......................75

D.K./NA/REF/NOT APPRO......................99

Q.18 When you buy potatoes, are you more likely to buy washed or unwashed potatoes ?

WASHED........................(75)........1

UNWASHED...................................2

BOTH EQUALLY...............................3

D.K..7 GO TO

REF/NA.....................................9 Q.19

Q.18A Why do you buy more (Q.18 RESPONSE) potatoes?

____

____(76-77)...___ ___

NONE INDICATED.............................75

D.K/REF/NOT APPRO/NA.......................99

CARD 2 (1-3) ___ ___ ___

Now, we'd like to get your general impressions of the potatoes available for consumers in this province...

Q.19 In general would you say that you are very satisfied...somewhat satisfied...somewhat dissatisfied...or very dissatisfied with the actual size and shape of potatoes available for you to buy?

VERY SATISFIED.................(4).............1 GO TO
SOMEWHAT SATISFIED...............................2 Q.20
DK/REF/NA..9
SOMEWHAT DISSATISFIED............................3
VERY DISSATISFIED................................4

Q.19A Why are you dissatisfied with the size and shape of potatoes available to you?

____

____(5-6).. ___ ___

D.K..77
REF/NA/NOT APPRO.................................99

Q.20 In general would you say that you are very satisfied...somewhat satisfied...somewhat dissatisfied...or very dissatisfied with the prices of potatoes in the New Brunswick market?

VERY SATISFIED.................(7).............1 GO TO
SOMEWHAT SATISFIED...............................2 Q.21
DK/REF/NA..9
SOMEWHAT DISSATISFIED............................3
VERY DISSATISFIED................................4

Q.20A Why are you dissatisfied with the price of potatoes available to you?

____

____(8-9).. ___ ___

D.K..77
REF/NA/NOT APPRO.................................99

Q.21 In general would you say that you are very satisfied...somewhat satisfied...somewhat dissatisfied...or very dissatisfied with the overall quality of potatoes available for you to buy?

VERY SATISFIED.................(10)............1 GO TO
SOMEWHAT SATISFIED.............................2 Q.22
DK/REF/NA......................................9
SOMEWHAT DISSATISFIED..........................3
VERY DISSATISFIED..............................4

Q.21A Why are you dissatisfied with the quality of potatoes available to you?

____

____(11-12).. ___ ___

D.K...77
REF/NA/NOT APPRO..............................99

Q.22 When you buy potatoes for your household, which potatoes do you buy most often...New Brunswick potatoes PEI potatoes....or potatoes from another province or the U.S.?

NB POTATOES...................(13).....1
PEI POTATOES..........................2
OTHER AREAS(Where?________________).....3
COMBINATION...........................4
D.K...................................7 GO TO
NA/REF................................9 Q. 23

Q.22A What, in particular, makes you buy (READ Q.22 RESPONSE) more than the other types available?

____

____(14-15)..___ ___

NO SPECIAL REASON..........................75
DK/NA/REF/NOT APPRO........................99

Now, we'd like to have you compare the potatoes produced in New Brunswick and PEI....which (READ EACH STATEMENT) New Bruswick or PEI potatoes ?

		NB	PEI	EQUAL/ SAME	NA/REF/DK
Q.23A have the best overall appearance?	(16)	1	2	3	9
Q.23B have the best packaging?	(17)	1	2	3	9
Q.23C have the best size and shape?	(18)	1	2	3	9
Q.23D have the best taste?	(19)	1	2	3	9
Q.23E have the lowest amount of bruises?	(20)	1	2	3	9
Q.23F have the best prices?	(21)	1	2	3	9
Q.23G have the best reputation for quality?	(22)	1	2	3	9
Q.23H have the best overall quality?	(23)	1	2	3	9
Q.23I are most preferred by you?	(24)	1	2	3	9

Q.23J Why do you prefer (Q.23I COMPARED TO ALTERNATIVE)?

____

____(25-26).. ___ ___

D.K..........................77

REF/NA/NOT APPRO..............99

Q.24 We'd like to end our questions about potatoes by asking you to look ahead a bit...in five years do you expect to be buying more...less or the same amount of potatoes as you are today?

INCREASE...................(27)....1

DECREASE...........................2

SAME...............................3

D.K................................7 GO TO

REFUSED.NA.........................9 Q.25

Q.24A Why do you think that you will be buying more/less potatoes five years from now?

____

____(28-29)..___ ___

D.K............................77

REF/NA/NOT APPRO..............99

To end our survey we want to ask you just a few questions about your household?
IF ONLY ONE PERSON ENTER ONE ADULT AND ASK ONLY APPROPRIATE QUESTIONS?

Q.25 Altogether, how many people 18 years of age or older live in your household?

ENTER NUMBER.....................(30-31)..___ ___

REF/NA/DK...............................99

Q.26 Altogether, how many children between the ages of 12 and 17 years live in your household?

ENTER NUMBER.....................(32-33)..___ ___

REF/NA/DK...............................99

Q.27 Altogether, how many children under the age of 12 live in your household?

ENTER NUMBER.....................(34-35)..___ ___

REF/NA/DK...............................99

Q.28 In what year were you born? ....(36-37) ___ ___

D.K/REF/NA...............................99

Q.29 What is your mother tongue-the language you first learned to speak?

ENGLISH...........................(38).....1

FRENCH......................................2

BILINGUAL ALWAYS............................3

OTHER ____________________________.............4

DK.REF/NA...................................9

Q.30 Which language is spoken in your home most often.. French..English or something else?

ENGLISH.............................(39).....1

FRENCH......................................2

BILINGUAL ALWAYS............................3

OTHER ______________________________..............4

DK.REF/NA...................................9

Q.31 Are you currently married--widowed--divorced--separated single or what?

MARRIED............................(40)...........1

DIVORCED/SEPARATED/...................................3

SINGLE/WIDOWED..4

DK/REF/NA...9

IF ONLY ONE ADULT ASK ONLY FOR APPROPRIOATE SEX..IF TWO
ASK BOTH QUESTIONS?

Q.32 Is the female head of your household currently employed, unemployed, disabled, retired, a student, at home or what?

EMPLOYED..........................(41)...1

UNEMPLOYED..............................2

DISABLED................................3

RETIRED.................................4

STUDENT.................................5 GO TO

AT HOME.................................6 Q.33

OTHER__________________________..............7

D.K/REF/N.A.............................9

Q.32A What is your/her usual occupation--that is, what do you/does she usually do for work? (ENTER RESPONDENTS EXACT WORDS: PROBE: Could you tell me what that involves?)

____

____ (42-43) ___ ___

D.K...77

REF...88

NOT APPRO...................................98

N.A...99

Q.33 Is the male head of your household currently employed, unemployed, disabled, retired, a student, or what?

EMPLOYED..........................(44)....1

UNEMPLOYED..............................2

DISABLED................................3

RETIRED.................................4

STUDENT.................................5 GO TO

AT HOME.................................6 Q.34

OTHER ______________________ 7

D.K/REF/N.A/NOT APPRO...................9

Q.33A What is your/his usual occupation--that is, what do you/does he usually do for work? (ENTER RESPONDENTS EXACT WORDS: PROBE: Could you tell me what that involves?)

____

____ (45-46) ___ ___

D.K...77

REF...88

NOT APPRO...................................98

N.A...99

Q.34 What was the last grade in school that you completed?

LESS THAN HIGH SCHOOL DIPLOMA.........(47-48)..1

HIGH SCHOOL COMPLETED..........................2

VOCATIONAL OR OTHER POST SECODARY,
NON-UNIVERSITY.................................3

SOME UNIVERSITY-NON DEGREE.....................4

UNIVERSITY GRADUATE............................5

GRADUATE SCHOOL OR HIGHER......................6

D.K..7

REF/NA...9

Q.35 Thinking of the total income for your household in 1986--that is income from all sources before taxes --was your total household income in 1986 more than $15,000?

YES...............................(49-50)..GO TO B

NO.......................................11 STOP

B. Was your total household income in 1986 more than $20,000?

YES......................................GO TO C

NO ....13 STOP

C. Was your total household income in 1986 more than $25,000?

YES......................................GO TO D

NO.......................................15 STOP

D. Was your total household income in 1986 more than $30,000?

YES......................................18
STOP
NO.......................................17

DON'T KNOW...............................77

REFUSED..................................88

N.A......................................98

AT THIS POINT REFER TO FOCUS GROUP RECRUITMENT PROCESS, AND THEN COMPLETE FOLLOWING INFORMATION.

REGARDLESS OF RECRUITMENT RESULTS....THANK RESPONDENT FOR PARTICIPATING IN THE SURVEY AND ENTER THE FOLLOWING DATA

Q.36 ENTER RESPONDENT'S SEX:
FEMALE........................(51)...........1

MALE...2

Q.37 ENTER APPROXIMATE LENGTH OF INTERVIEW...........(52-53).....___ ___

CHECK FOR COMPLETION.............THANKS.

NO. DU PARTICIPANT (1-3) ___ ___ ___
COMTE (4-5) ___ ___

Q.1 Au Total, combien d'années avez-vous été impliqué dans la production des pommes de terre? (SI TOUTE LA VIE: ça veut dire combien d'années?)

INSCRIRE LE NOMBRE D'ANNEES.........(6-7)..........___ ___

N. S. P..77

REF..88

N.A..98

Q.2 Présentement est-ce que vous cultivez seul, en affaire avec un autre membre de votre famille ou en association avec quelqu'un d'autre?

SEUL.............................(8)............1

N. S. P..7 ALLER A LA Q.3

REF..8

N.A..9

AVEC QUELQU'UN D'AUTRE............................2

Q.2A Puisque nous ne voulons contacter qu'une seule personne par ferme, pouvez-vous nous donner les noms des autres producteurs qui sont impliqués dans votre ferme (SI NECESSAIRE: des fils... frères... ou parents) INSCRIRE LES NOMS CI-DESSOUS ET AVISER LE SURVEILLANT À LA FIN DE L'ENTREVUE:

____

____

Q.3 Au total, combien d'acres de pommes de terre plantez-vous cette année?

INSCRIRE LE NOMBRE D'ACRES..........(9-12).___ ___ ___ ___

N. S. P..7777

REF..8888

N.A..9998

Q.3A Au total, quel pourcentage du nombre d'acres total que vous avez planté vous appartient par opposition à celui que vous louez?

INSCRIRE LE POURCENTAGE.............(13-15).... ___ ___ ___

N. S. P...997

REF...998

N.A...999

Q.4 Au total, combien de barils de pommes de terre avez-vous produit l'année dernière? (SI LE PARTICIPANT REPOND EN QUINTAUX, DIVISEZ LE NOMBRE DE QUINTAUX PAR 1.65 POUR OBTENIR LE NOMBRE DE BARILS)

INSCRIRE LE NOMBRE TOTAL-(16-20)....... ___ ___ ___ ___ ___

N. S. P.......................................77777

REF...88888

N.A...99999

Q.5 En vous référant aux cinq dernières années, est-ce que votre nombre total d'acres de pommes de terre a augmenté... est resté le même... ou a diminué?

RESTE LE MEME.......................(21)............3 ALLER
A LA
N. S. P..7 Q.6

REF..8

N.A..9

A AUGMENTE...1

A DIMINUE..2

Q.5A Combien d'acres avez-vous ajouté/soustrait de votre production au cours des cinq dernières années?

INSCRIRE LE NOMBRE D'ACRES..........(22-24)... ___ ___ ___

N. S. P...777

REF...888

N.A...998

NON APP...000

Q.6 En vous référant aux cinq prochaines années... est-ce que vous planifiez d'augmenter... de maintenir... ou de diminuer votre nombre d'acres de pommes de terre?

MAINTENIR..........................(25)...........	3	ALLER A LA Q.7
N. S. P..	7	
REF..	8	
N.A..	9	
AUGMENTER..	1	
DIMINUER...	2	

Q.6A Au total, de combien d'acres planifiez-vous augmenter/diminuer votre production au cours des cinq prochaines années?

INSCRIRE LE NOMBRE D'ACRES..........(26-28)...	___ ___ ___
N. S. P...	777
REF...	888
N.A...	998
NON APP...	000

Maintenant, pour ce qui est de vos exploitations courantes...

Q.7 De vos (VOIR NOMBRE D'ACRES A LA Q.3) acres, quel pourcentage avez-vous ou allez-vous planter (LIRE CHAQUE ITEM):

		POURCENTAGE	NSP	REF	NA
Q.7A1 pour les marchés de la pommes de terre de semence?	(29-31)	___ ___ ___	777	888	999
Q.7A2 pour les marchés de la transformation?	(32-34)	___ ___ ___	777	888	999
Q.7A3 spécifiquement pour les marchés de la pomme de terre de table?	(35-37)	___ ___ ___	777	888	999
Q.7A4 pour autre chose? (Quoi? ________________)	(38-40)	___ ___ ___	777	888	999

VERIFIER LE TOTAL = 100% ET VERIFIER LA SEQUENCE

SECTION A: LES PRODUCTEURS DE POMMES DE TERRE DE SEMENCE - VOIR Q.7 S'IL NE PRODUIT PAS POUR LES MARCHES DE LA POMME DE TERRE DE TABLE, ALLER A Q.8

Q.7B Quelles variétés composent le plus gros volume de votre récolte de pommes de terre de semence? POUR LES QUATRE PREMIERES VARIETES DEMANDER: Pourquoi plantez-vous des (LIRE CHAQUE VARIETE ET INSCRIRE LA REPONSE)

Q.7B1 VARIETE 1 ______________________________ (41-42) ___ ___

Q.7B2 POURQUOI ______________________________

______________________________ (43-44) ___ ___

Q.7B3 VARIETE 2 ______________________________ (45-46) ___ ___

Q.7B4 POURQUOI ______________________________

______________________________ (47-48) ___ ___

Q.7B5 VARIETE 3 ______________________________ (49-50) ___ ___

Q.7B6 POURQUOI ______________________________

______________________________ (51-52) ___ ___

Q.7B7 VARIETE 4 ______________________________ (53-54) ___ ___

Q.7B8 POURQUOI ______________________________

______________________________ (55-56) ___ ___

Q.7C Lors d'une année normale, quel pourcentage de votre récolte totale vendez-vous habituellement comme pomme de terre semence?

INSCRIRE LE POURCENTAGE............(57-59)....___ ___ ___

N. S. P...777

REF...888

NON APP...000

N.A...999

Q.7D Pour une année moyenne, est-ce que vous vendez habituellement vos pommes de terre de semence à un expéditeur... à un courtier ou exportateur... est-ce que vous vendez vous-même vos propres pommes de terre de semence ou autre?

VEND SEULEMENT A UN EXPEDITEUR......(60)............1 ALLER
A LA
VEND SEULEMENT A UN COURTIER/EXPORTATEUR............2 Q.7F

N.S.P..7

REF/N.A..8

VEND LUI-MEME....................................3

VEND LUI-MEME ET AUTRE FACON.....................4

Environ quel pourcentage de vos pommes de terre de semance sont vendues...

		POURCENTAGE	NSP	REF	NA	NON APP
Q.7E1 au Nouveau Brunswick?	(61-63)	___ ___ ___	777	888	999	000
Q.7E2 aux autres provinces?	(64-66)	___ ___ ___	777	888	999	000
Q.7E3 aux Etats-Unis?	(67-69)	___ ___ ___	777	888	999	000
Q.7E4 à l'extérieur de l'Amérique du Nord?	(70-72)	___ ___ ___	777	888	999	000

Q.7F De façon générale, diriez-vous que vous êtes très satisfait...assez satisfait... assez insatisfait... très insatisfait du prix que vous recevez pour vos pommes de terre de semence?

TRES SATISFAIT....................(73)............1

ASSEZ SATISFAIT..................................2

ASSEZ INSATISFAIT................................3

TRES INSATISFAIT.................................4

N.S.P..7

REF..8

N.A..9

NON APP..0

Q.7G Si c'est le cas, quels problèmes avez-vous rencontré lorsque vous avez essayé de vendre vos pommes de terre de semence (SI C'EST LE PRIX: CODER ET ESSAYER D'OBTENIR UNE AUTRE REPONSE)

____

____

________________________________(74-75) ___ ___

AUCUN..75

N.S.P..77

REF/N.A..88

NON APP..98

SECTION B: QUESTIONS AUX PRODUCTEURS POUR LES MARCHES DE TRANSFORMATION VERIFIER LA Q.7 ET S'IL N'EN A PAS PLANTE-ALLER A LA Q.9A

CARTE 2
NO. DU PARTICIPANT (1-3) ___ ___ ___

Q.8A Quelles variétés composent le plus gros volume de votre récolte de pommes de terre de transormation? POUR LES QUATRE PREMIERES VARIETES DEMANDER: Pourquoi plantez-vous des (LIRE CHAQUE VARIETE ET INSCRIRE LA REPONSE)

Q.8A1 VARIETE 1____________________________(4-5) ___ ___

Q.8A2 POURQUOI ____________________________

______________________________________(6-7) ___ ___

Q.8A3 VARIETE 2____________________________(8-9) ___ ___

Q.8A4 POURQUOI ____________________________

______________________________________(10-11) ___ ___

Q.8A5 VARIETE 3____________________________(12-13) ___ ___

Q.8A6 POURQUOI ____________________________

______________________________________(14-15) ___ ___

Q.8A7 VARIETE 4____________________________(16-17) ___ ___

Q.8A8 POURQUOI ____________________________

______________________________________(18-19) ___ ___

Q.8B Lors d'une année normale, quel pourcentage de votre récolte totale vendez-vous habituellement comme pomme de terre de transormation?

INSCRIRE LE POURCENTAGE.............(20-22)....___ ___ ___

N. S. P.......................................777

REF...888

N.A...999

NON APP.......................................000

Q.8C Environ quel pourcentage de votre récolte totale de pommes de terre de transformation est vendu

		POURCENTAGE	NSP	REF	NA	NON APP
Q.8C1 à l'intérieur du Nouveau-Brunswick?	(23-25)	___ ___ ___	777	888	999	000
Q.8C2 en Ontario?	(26-28)	___ ___ ___	777	888	999	000
Q.8C3 au Québec?	(29-31)	___ ___ ___	777	888	999	000
Q.8C4 dans les autres provinces?	(32-34)	___ ___ ___	777	888	999	000
Q.8C5 sur le marché des Etats-Unis?	(35-37)	___ ___ ___	777	888	999	000

Q.8D De façon générale, diriez-vous que vous êtes très satisfait...assez satisfait... assez insatisfait... très insatisfaite du prix que vous recevez pour vos pommes de terre de transformation?

TRES SATISFAIT......................(38)............1

ASSEZ SATISFAIT...................................2

ASSEZ INSATISFAIT.................................3

TRES INSATISFAIT..................................4

N.S.P...7

REF...8

N.A...9

NON APP...0

Q.8E Si c'est le cas, quels problèmes avez-vous rencontré lorsque vous avez essayé de vendre vos pommes de terre de transformation (SI C'EST LE PRIX: CODER ET ESSAYER D'OBTENIR UNE AUTRE REPONSE)

____(39-40) ___ ___

AUCUN..75
N.S.P..77
REF/N.A..88
NON APP..98

SECTION C: POUR LES PRODUCTEURS OU LES VENDEURS DE POMMES DE TERRE DE TABLE: VERIFIER Q.7 POUR LA PRODUCTION ET DEMANDER LA Q.9A POUR DETERMINER SI CETTE SECTION EST APPROPRIEE

Q.9A Lors d'une année normale, quel pourcentage de votre production totale vendez-vous habituellement comme pomme de terre de table?

INSCRIRE LE POURCENTAGE.............(41-43)....___ ___ ___
N. S. P...777
REF...888
N.A...999
NON APP...000

S'IL N'EN PLANTE PAS ALLER A LA Q.16

Q.9B Quelles variétés composent le plus gros volume de vos ventes de pommes de terre de table? POUR LES QUATRE PREMIERES VARIETES DEMANDER: Pourquoi vendez-vous beaucoup de (LIRE CHAQUE VARIETE ET INSCRIRE LA REPONSE)

Q.9B1 VARIETE 1______________________________(44-45) ___ ___

Q.9B2 POURQUOI ______________________________

______________________________(46-47) ___ ___

Q.9B3 VARIETE 2______________________________(48-49) ___ ___

Q.9B4 POURQUOI ______________________________

______________________________(50-51) ___ ___

Q.9B5 VARIETE 3______________________________(52-53) ___ ___

Q.9B6 POURQUOI ______________________________

______________________________(54-55) ___ ___

Q.9B7 VARIETE 4______________________________(56-57) ___ ___

Q.9B8 POURQUOI ______________________________

______________________________(58-59) ___ ___

Q.9C Lorsque vous vendez vos pommes de terre de table, en vendez-vous à des expéditeurs?

OUI..............................(60)............1

NON...2 ALLER

A LA

N.S.P.......................................7 Q.10

REF...8

N.A...9

NON APP.....................................0

Q.9D En moyenne, environ quel pourcentage de votre production totale de pommes de terre de table vendez-vous aux expéditeurs?

INSCRIRE LE POURCENTAGE.............(61-63)....___ ___ ___

N. S. P..777

REF..888

N.A..999

NON APP..000

Q.9E De façon générale, est-ce que vous emballez la plupart des pommes de terre vendues aux expéditeurs ou est-ce que vous les vendez en vrac?

EN VRAC.....................(64).............2 ALLER A LA

N. S. P.....................................7 Q.9G

REF...8

N.A...9

NON APP.....................................0

EMBALLEES...................................1

LES DEUX....................................3

Q.9F Est-ce que vous vendez aux expéditeurs des (LIRE CHAQUE GENRE)

		OUI	NON	NSP	REF	NA	NON APP
Q.9F1 sacs en polythène £5?	(65)	1	2	7	8	9	0
Q.9F2 sacs en polythène £10?	(66)	1	2	7	8	9	0
Q.9F3 sacs en papier £5?	(67)	1	2	7	8	9	0
Q.9F4 sacs en papier £10?	(68)	1	2	7	8	9	0
Q.9F5 sacs en papier £50?	(69)	1	2	7	8	9	0
Q.9F6 cartons de pommes de des terre comptées?	(70)	1	2	7	8	9	0
Q.9F7 autre emballage?	(71)	1	2	7	8	9	0

(SPECIFIER) ______________________________

Q.9G De façon générale, vendez-vous à plusieurs expéditeurs différents, à seulment quelques expéditeurs ou quoi?

UNE VARIETE........................(72)............1
QUELQUES-UNS.......................................2
AUTRE (SPECIFIER) ______________________________..3
N. S. P..7
REF..8
N.A..9
NON APP..0

CARTE 3
NO. DU PARTICIPANT (1-3) ___ ___ ___

Q.9H Diriez-vous que vous faisez des affaires avec les mêmes expéditeurs depuis trois ans ou plus ou faisez-vous des affaires avec des expéditeurs différents à chaque année?

TROIS AN OU PLUS...................(4).............1
CHANGE REGULIEREMENT...............................2
AUTRE (SPECIFIER) ______________________________..3
N. S. P..7
REF..8
N.A..9
NON APP..0

Q.9I De façon générale, diriez-vous que vous êtes très satisfait...assez satisfait... assez insatisfait... ou très insatisfait du prix que vous recevez des expéditeurs?

TRES SATISFAIT	(5)	1
ASSEZ SATISFAIT		2
ASSEZ INSATISFAIT		3
TRES INSATISFAIT		4
N.S.P		7
REF		8
N.A		9
NON APP		0

Q.9J De façon générale, diriez-vous que vous avez une excellente... bonne... passable... ou pauvre relation commerciale avec les expéditeurs?

EXCELLENTE	(6)	1	ALLER A LA Q.10
BONNE		2	
AUTRE (SPECIFIER) ____________________ ____________________		5	
N.S.P		7	
REF		8	
N.A		9	
NON APP		0	
PASSABLE		3	
PAUVRE		4	

Q.9K Qu'est-ce qui vous fait dire que vous avez une passable ou pauvre relation commerciale avec les expéditeurs? (INSCRIRE EXACTEMENT)

____

____ (7-8) ___ ___

N.S.P	77
REF	88
N.A	98
NON APP	00

Q.10 Lorsque vous vendez vos pommes de terre de table, est-ce que vous en vendez aux grossistes?

OUI (9)	1	
NON	2	ALLER A LA Q.11
N.S.P	7	
REF	8	
N.A	9	
NON APP	0	

Q.10A En moyenne, environ quel pourcentage de votre production totale de pommes de terre de table vendez-vous aux grossistes?

INSCRIRE LE POURCENTAGE (10-12)	___ ___ ___
N. S. P	777
REF	888
N.A	999
NON APP	000

Q.10B De façon générale, est-ce que vous emballez la plupart des pommes de terre vendues aux grossistes ou est-ce que vous les vendez en vrac?

EN VRAC	(13)	2	ALLER A LA Q.10D
N. S. P		7	
REF		8	
N.A		9	
NON APP		0	
EMBALLEES		1	
LES DEUX		3	

Q.10C Est-ce que vous vendez aux grossistes des (LIRE CHAQUE GENRE)

		OUI	NON	NSP	REF	NA	NON APP
Q.10C1 sacs en polythène £5?	(14)	1	2	7	8	9	0
Q.10C2 sacs en polythène £10?	(15)	1	2	7	8	9	0
Q.10C3 sacs en papier £5?	(16)	1	2	7	8	9	0
Q.10C4 sacs en papier £10?	(17)	1	2	7	8	9	0
Q.10C5 sacs en papier £50?	(18)	1	2	7	8	9	0
Q.10C6 cartons de pommes de des terre comptées?	(19)	1	2	7	8	9	0
Q.10C7 autre emballage?	(20)	1	2	7	8	9	0

(SPECIFIER) ______________________________

Q.10D Diriez-vous que vous faisez des affaires avec les mêmes grossistes depuis trois ans ou plus ou faisez-vous des affaires avec des grossistes différents à chaque année?

TROIS AN OU PLUS	(21)	1
CHANGE REGULIEREMENT		2
AUTRE (SPECIFIER) ______________________________		3
N. S. P		7
REF		8
N.A		9
NON APP		0

Q.10E De façon générale, diriez-vous que vous êtes très satisfait...assez satisfait... assez insatisfait... très insatisfait du prix que vous recevez des grossistes?

TRES SATISFAIT	(22)	1
ASSEZ SATISFAIT		2
ASSEZ INSATISFAIT		3
TRES INSATISFAIT		4
N.S.P		7
REF		8
N.A		9
NON APP		0

Q.10F De façon générale, diriez-vous que vous avez une excellente... bonne... passable... ou pauvre relation commerciale avec les grossistes?

EXCELLENTE	(23)	1	ALLER A LA Q.11
BONNE		2	
AUTRE (SPECIFIER) ______________________________		5	
N.S.P		7	
REF		8	
N.A.		9	
NON APP		0	
PASSABLE		3	
PAUVRE		4	

Q.10G Qu'est-ce qui vous fait dire que vous avez une passable ou pauvre relation commerciale avec les grossistes? (INSCRIRE EXACTEMENT)

____

____(24-25)___ ___

N.S.P	77
REF	88
N.A.	98
NON APP	00

Q.11 Lorsque vous vendez vos pommes de terre de table, est-ce que vous en vendez directement aux épiceries, aux dépanneurs ou autre genre de détaillants?

OUI	(26)	1	
NON		2	ALLER A LA Q.12
N.S.P		7	
REF		8	
NON APP		9	

Q.11A En moyenne, environ quel pourcentage de votre production totale de pommes de terre de table vendez-vous aux détaillants?

INSCRIRE LE POURCENTAGE.............(27-29)....___ ___ ___

N. S. P......................................777

REF..888

N.A..999

NON APP......................................000

Q.11B De façon générale, vendez vous à plusieurs détaillants différents, à seulement quelques détaillants ou quoi?

UNE VARIETE........................(30)............1

QUELQUES-UNS...2

AUTRE (SPECIFIER) ________________________________..3

N. S. P..7

REF..8

N.A..9

NON APP..0

Q.10C Est-ce que vous rendez aux détaillants des (LIRE CHAQUE GENRE)

		OUI	NON	NSP	REF	NA	NON APP
Q.11C1 sacs en polythène £5?	(31)	1	2	7	8	9	0
Q.11C2 sacs en polythène £10?	(32)	1	2	7	8	9	0
Q.11C3 sacs en papier £5?	(33)	1	2	7	8	9	0
Q.11C4 sacs en papier £10?	(34)	1	2	7	8	9	0
Q.11C5 sacs en papier £50?	(35)	1	2	7	8	9	0
Q.11C6 cartons de pommes de de terre comptées?	(36)	1	2	7	8	9	0
Q.11C7 autre emballage?	(37)	1	2	7	8	9	0

(SPECIFIER) ______________________________

Q.11D Diriez-vous que vous faisez des affaires avec les mêmes détaillants depuis trois ans ou plus ou faisez-vous des affaires avec des détaillants différents à chaque année?

TROIS AN OU PLUS	(38)	1
CHANGE REGULIEREMENT		2
AUTRE (SPECIFIER) ________________		3
N. S. P		7
REF		8
N.A		9
NON APP		0

Q.11E De façon générale, diriez-vous que vous êtes très satisfait...assez satisfait... assez insatisfait... ou très insatisfait du prix que vous recevez des détaillants?

TRES SATISFAIT	(39)	1
ASSEZ SATISFAIT		2
ASSEZ INSATISFAIT		3
TRES INSATISFAIT		4
N.S.P		7
REF		8
N.A		9
NON APP		0

Q.11F De façon générale, diriez-vous que vous avez une excellente... bonne... passable... ou pauvre relation commerciale avec les détaillants?

EXCELLENTE	(40)	1	ALLER A LA Q.12
BONNE		2	
AUTRE (SPECIFIER) ____________________		5	
N.S.P		7	
REF		8	
N.A		9	
NON APP		0	
PASSABLE		3	
PAUVRE		4	

Q.11G Qu'est-ce qui vous fait dire que vous avez une passable ou pauvre relation commerciale avec les détaillants? (INSCRIRE EXACTEMENT)

____

____(41-42)___ ___

N.S.P	77
REF	88
N.A	98
NON APP	00

Q.12 Lorsque vous vendez vos pommes de terre de table, est-ce que vous en vendez directement aux consommateurs à partir de votre ferme ou des marchés agricoles?

OUI	(12)	1	
NON		2	ALLER A LA Q.13
N.S.P		7	
REF		8	
N.A		9	
NON APP		0	

Q.12A En moyenne, environ quel pourcentage de votre production totale de pommes de terre de table vendez-vous directement aux consommateurs à partir de votre ferme ou des marchés agricoles?

INSCRIRE LE POURCENTAGE.............(44-46)....___ ___ ___

N. S. P......................................777

REF..888

N.A..999

NON APP......................................000

Q.12B S'il y a lieu, quels problémes avez-vous rencontré en essayant de vendre vos pommes de terre de table directement aux consommateurs? (SI C'EST LE PRIX: INSCRIRE ET TENTER D'OBTENIR UNE AUTRE REPONSE)

____

____

____(47-48) ___ ___

AUCUN...75

N. S. P......................................777

REF..888

N.A..999

NON APP......................................000

Q.13 Quel pourcentage de vos pommes de terre de table passent par le processus du lavage?

INSCRIRE LE POURCENTAGE.............(49-51)....___ ___ ___

N. S. P......................................777

REF..888

N.A..999

NON APP......................................000

SI AUCUN ALLER A LA Q.14

Q.13A En moyenne, quel pourcentage de vos pommes de terre de table sont rejetées au cours du processus de lavage?

INSCRIRE LE POURCENTAGE.............(52-54)....___ ___ ___

N. S. P...777

REF...888

N.A...999

NON APP...000

Q.14 Quel pourcentage de vos pommes de terre de table passent par le processus du brossage?

INSCRIRE LE POURCENTAGE.............(55-57)....___ ___ ___

N. S. P...777

REF...888

N.A...999

NON APP...000

SI AUCUN ALLER A LA Q.15

Q.14A En moyenne, quel pourcentage de vos pommes de terre de table sont rejetées au cours du processus du brossage?

INSCRIRE LE POURCENTAGE.............(58-60)....___ ___ ___

N. S. P...777

REF...888

N.A...999

NON APP...000

NE PAS DEMANDER SI LES POMMES DE TERRE SON VENDUES
SEULEMENT A UN EXPEDITEUR.

Q.15 Environ (REPETER L'ENONCE) quel pourcentage de vos pommes de terre de table vendez-vous sur...

		POURCENTAGE	NSP	REF	NA	NON APP
Q.15A le marché du Nouveau-Brunswick?	(61-63)	___ ___ ___	777	888	999	000
Q.15B le marché de l'Ontario?	(64-66)	___ ___ ___	777	888	999	000
Q.15C le marché du Québec?	(67-69)	___ ___ ___	777	888	999	000
Q.15D le marché des autres provinces?	(70-72)	___ ___ ___	777	888	999	000
Q.15E le marché des Etats-Unis?	(73-75)	___ ___ ___	777	888	999	000
Q.15F le marché à l'extérieur de l'Amérique du Nord?	(76-78)	___ ___ ___	777	888	999	000

DEMANDER A TOUS LES PARTICIPANTS

CARTE 4
NO. DU PARTICIPANT (1-3) ___ ___ ___

Q.16 En pensant à l'ensemble de votre exploitation agricole, diriez-vous que le marché de la pomme de terre de table est trés important... assez important... pas très important... ou pas important du tout pour votre exploitation?

TRES IMPORTANT	(4)	1
ASSEZ IMPORTANT		2
PAS TRES IMPORTANT		3
PAS IMPORTANT DU TOUT		4
N. S. P		7
REF		8
N.A		9

Q.17 En pensant à l'ensemble de l'industrie de la pomme de terre du Nouveau-Brunswick, diriez-vous que le marché de la pomme de terre de table est très important... assez important... pas très important... ou pas du tout important à l'industrie de la pomme de terre du Nouveau-Brunswick?

TRES IMPORTANT.....................(5).............1

ASSEZ IMPORTANT..................................2

PAS TRES IMPORTANT...............................3

PAS DU TOUT IMPORTANT............................4

N. S. P..7

REF..8

N.A..9

Q.18 En pensant à l'ensemble de la commercialisation de vos pommes de terre, diriez-vous que vous êtes très satisfait... assez satisfait... assez insatisfait ou très insatisfait des façons dont vous pouvez vendre vos pommes de terre?

TRES SATISFAIT.....................(6).............1

ASSEZ SATISFAIT..................................2

ASSEZ INSATISFAIT................................3

TRES INSATISFAIT.................................4

N. S. P..7

REF..8

N.A..9

Q.19 De façon générale, diriez vous que vous êtes très satisfait... assez satisfait... assez insatisfait ou très insatisfait des prix que vous avez reçus pour vos pommes de terre?

TRES SATISFAIT.....................(7).............1

ASSEZ SATISFAIT..................................2

ASSEZ INSATISFAIT................................3

TRES INSATISFAIT.................................4

N. S. P..7

REF..8

N.A..9

Q.20 En pensant à l'ensemble du système pour la commercialisation de vos pomme de terre, quelle chose, à part du prix que vous recevez, aimeriez-vous voir changer?

____

____

____(8-9) ___ ___

N. S. P..7

REF..8

N.A..9

Q.21 En pensant à la commercialisation de vos pomme de terre, quel genre de marché aimeriez-vous fournir -- celui de la pomme de terre de semence, de transformation ou de table?

SEMENCE...........................(10-11)........11

TRANSFORMATION...................................12

TABLE..13

COMBINATION......................................14

N. S. P...77

REF..88

N.A..99

Q.21A Qu'est-ce qui vous fait choisir ce marché pour vos pommes de terre? (INSCRIRE EXACTEMENT)

____

____

____(12-13) ___ ___

N. S. P...77

REF..88

N.A..99

Q.22 Selon votre expérience, diriez-vous qu'il est très important... assez important ou pas très important pour les producteurs de pommes de terre de table de connaître les goûts et les attitudes des consommateurs?

TRES IMPORTANT.......................(14)............1

ASSEZ IMPORTANT.....................................2

PAS TRES IMPORTANT..................................3

N. S. P...7

REF...8

N.A...9

Q.23 Selon vous personnellement, est-ce que les attitudes des consommateurs de pommes de terre sont très importantes... assez importantes ou pas très importantes lorsque vous décidez de la variété de pommes de terre que vous allez planter?

TRES IMPORTANT.......................(15)............1

ASSEZ IMPORTANT.....................................2

PAS TRES IMPORTANT..................................3

N. S. P...7

REF...8

N.A...9

Q.24 De façon générale, diriez-vous que vous êtes très conscient, assez conscient ou pas très conscient de ce que les consommateurs pensent des pommes de terre et des produits de concurrence?

TRES CONSCIENT.......................(16)............1

ASSEZ CONSCIENT.....................................2

PAS TRES CONSCIENT..................................3

N. S. P...7

REF...8

N.A...9

Q.25 De façon générale, comment les consommateurs évalueraient-ils la qualité des pommes de terre du Nouveau-Brunswick qui sont offertes sur le marché. Est-ce que les consommateurs diraient que les pommes de terre de table du Nouveau-Brunswick sont excellentes... bonnes... passables... ou pauvres?

EXCELLENTES	(17)	1
BONNES		2
PASSABLES		3
PAUVRES		4
N. S. P		7
REF		8
N.A		9
NON APP		0

Q.26 Quelle est votre propre évaluation, diriez-vous que les pommes de terre de table du Nouveau-Brunswick qui sont offertes aux consommateurs Née-Brunswickois sont excellentes... bonnes... passables... ou pauvres?

EXCELLENTES	(18)	1
BONNES		2
PASSABLES		3
PAUVRES		4
N. S. P		7
REF		8
N.A		9
NON APP		0

Maintenant nous voulons vous poser quelques questions au sujet de l'aspect commercial de votre ferme...

Q.27 En vous basant sur votre expérience, quel serait le coût moyen en argent pour produire un acre de pommes de terre?

INSCRIRE LE MONTANT.................(19-22) ___ ___ ___ ___

N. S. P..9997

REF..9998

N.A..9999

Q.28 D'après votre expérience quel serait le coût total (en incluant la dépréciation) en moyenne pour produire un acre de pommes de terre?

INSCRIRE LE MONTANT.................(23-26) ___ ___ ___ ___

N. S. P..9997

REF..9998

N.A..9999

Q.29 Lors d'une année normale, quel pourcentage de votre récolte totale est soit vendue ou promise par contrat avant le 31 décembre?

INSCRIRE LE POURCENTAGE.............(27-29) ___ ___ ___

N. S. P...777

REF...888

N.A...999

Q.30 Lors d'une année normale, quel pourcentage de votre récolte totale est soit vendue ou promise par contrat avant le 30 avril?

INSCRIRE LE POURCENTAGE.............(30-32) ___ ___ ___

N. S. P...777

REF...888

N.A...999

Q.31 Qui maintient les dossiers commerciaux de votre exploitation... vous-même, quelqu'un d'autre chez vous, un comptable ou qui?

LE PRODUCTEUR	(33)	1
QUELQU'UN D'AUTRE CHEZ LUI		2
UN COMPTABLE		3
AUTRE		4
N. S. P		7
REF		8
N.A		9

Q.32 Est-ce que vos dossiers commerciaux sont maintenus sur un ordinateur?

OUI	(34)	1
NON		2
N. S. P		7
REF		8
N.A		9

Q.33 Etes-vous présentement impliqué dans d'autre genre d'expoitation ou de production agricole?

NON	(35)	2	ALLER A LA Q.34
N. S. P		7	
REF		8	
N.A		9	
NON APP		0	
OUI		1	

Q.33A Dans quels autres genres d'agriculture êtes-vous impliqué?

____

____(36-37) ___ ___

N. S. P	77
REF	88
N.A	99
NON APP	00

Pour terminer notre étude, nous aimerions connaître vos opinions sur certaines questions qui concernent l'industrie en général:

Q.34 De façon générale, diriez-vous que la qualité des pommes de terre cultivées au Nouveau-Brunswick est excellente... bonne... passable... ou pauvre?

EXCELLENTE	(38)	1
BONNE		2
PASSABLE		3
PAUVRE		4
N. S. P		7
REF		8
N.A		9

Q.35 De façon générale, diriez-vous que le ministère de l'Agriculture provincial a fait un travail excellent... bon... passable... ou pauvre pour aider le développement de l'industrie de la pomme de terre dans cette province?

EXCELLENT	(39)	1
BON		2
PASSABLE		3
PAUVRE		4
N. S. P		7
REF		8
N.A		9

Q.36 De façon générale, diriez-vous qu'Agriculture Canada a fait un travail excellent... bon... passable... ou pauvre pour aider le développement de l'industrie de la pomme de terre dans cette province?

EXCELLENT..........................(40)............1

BON..2

PASSABLE...3

PAUVRE...4

N. S. P..7

REF..8

N.A..9

Q.37 De façon générale, diriez-vous que l'Agence de la pomme de terre fait un travail excellent... bon... passable... ou pauvre pour représenter les intérêts des producteurs de pomme de terre dans cette province?

EXCELLENT..........................(41)............1

BON..2

PASSABLE...3

PAUVRE...4

N. S. P..7

REF..8

N.A..9

Q.38 Seriez-vous en faveur ou contre des changements qui permettraient aux expéditeurs de devenir membres du conseil de l'Agence de la pomme de terre?

EN FAVEUR..........................(42)............1

CONTRE...2

PAS D'OPINION......................................3

N. S. P..7

REF..8

N.A..9

Q.39 De façon générale, seriez-vous en faveur ou contre l'idée d'établir des procédures d'inspection pour les pommes de terre de table vendues à l'intérieur du Nouveau-Brunswick?

EN FAVEUR	(43)	1
CONTRE		2
PAS D'OPINION		3
N. S. P		7
REF		8
N.A		9

Q.40 Si des normes d'inspection étaient établies pour le marché de la pomme de terre de table vendue au Nouveau-Brunswick, qui devrait surveiller cette inspection... le gouvernement fédéral... le gouvernement provincial... l'Agence de la pomme de terre, d'autres groupes ou organismes (lequel) ou autre?

GOUVERNEMENT FEDERAL	(44)	1
GOUVERNEMENT PROVINCIAL		2
L'AGENCE		3
AUTRE (SPECIFIER ________________________)		4
N. S. P		7
REF		8
N.A		9

Q.41 Présentement êtes-vous en faveur ou contre l'établissement d'une Agence nationale de la pomme de terre?

EN FAVEUR	(45)	1
CONTRE		2
PAS D'OPINION		3
N. S. P		7
REF		8
N.A		9

Q.42 Si une Agence nationale de la pomme de terre était établie, pensez-vous que les producteurs du Nouveau-Brunswick seraient avantagés, seraient dans la même position, ou seraient désanvantagés par rapport à ce qu'ils sont maintenant?

AVANTAGES..........................(46)............1

LE MEME..2

DESAVANTAGES.....................................3

PAS D'OPINION....................................4

N. S. P..7

REF..8

N.A..9

Q.43 Quel serait l'avantage principal d'une agence nationale pour l'industrie de la pomme de terre du Nouveau-Brunswick?

____

____(47-48) ___ ___

N. S. P...77

REF...88

N.A...99

Q.44 Quel serait le principal désavantage d'une agence nationale pour l'industrie de la pomme de terre du Nouveau-Brunswick?

____

____(49-50) ___ ___

N. S. P...77

REF...88

N.A...99

Q.45 Selon votre expérience, quel est le plus gros problème auquel font face aujourd'hui les producteurs de pommes de terre du Nouveau-Brunswick?

____

____(51-52) ___ ___

N. S. P..77 ALLER A LA FIN

REF..88

N.A..99

Q.46 En regardant cinq ans dans l'avenir, pensez-vous que l'industrie pourra régler les problèmes relatifs à (LIRE LA REPONSE A LA Q.46)... SI OUI: de quell façon ce problème sera-t-il réglé... SI NON... pourquoi le problème ne sera-t-il pas réglé?

____

____(53-54) ___ ___

N. S. P..77

REF..88

N.A..99

REMERCIER ET TERMINER L'ENTREVUE

INSCRIRE LA DUREE DE L'ENTREVUE_________________________(55-56) ___ ___

Dans ce questionnaire nous voulons vous demander des questions sur la nourriture pour toute la famille. Donc j'aimerais savoir tout d'abord, au total. Combien y - a - t -il de personne dans votre famille, vous y compris(e)?

NUM (1-2) ___ ___

SI LE NOMBRE DéPASSE UN (1) UTILISEZ "FAMILLE" DANS TOUT LE SONDAGE

SI LA PERSONNE ET CéLIBATAIRE, UTILISEZ (VOUS) (TU)

RESP (3-6)___ ___ ___ ___

TEL (7-9) ___ ___ ___

Q.1 Tout d'abord nous aimerions savoir les différentes sortes de nourriture que vous (votre famille) mangez aujourd'hui, comparativement à il y a deux ans... Diriez vous que vous (et votre famille) mangez plus... moins ou la même quantité de (LIRE CHACUN DES GROUPES ALIMENTAIRES) aujourd'hui, qu' il y a deux ans?

			PLUS	MOINS	MEME QUANTITE	NSP/REF/PDR
1A	boeuf?	(10)	1	2	3	9
1B	riz?	(11)	1	2	3	9
1C	poulet?	(12)	1	2	3	9
1D	pommes de terre?	(13)	1	2	3	9
1E	pâtes (alimentaires)?	(14)	1	2	3	9
1F	porc?	(15)	1	2	3	9
1G	poisson?	(16)	1	2	3	9
1H	salades?	(17)	1	2	3	9
1I	légumes?	(18)	1	2	3	9

INTERVIEWEUR: REFEREZ-VOUS A LA Q.1
SI LE PARTICIPANT MANGE MOINS/PLUS DE POMMES DE TERRE QU' AUPARAVANT:

Q.2 D'après vous qu'elle est la raison principale qui fait que vous/votre famille mangez plus/moins de pommes de terre aujourd'hui?

____

____...(19-20) ___ ___

AUCUNE RAISON SPECIALE...................75

NE SAIT PAS..............................77

REFUSE...................................88

PAS DE REPONSE...........................98

NON APPROUVE.............................00

INTERVIEWEUR: REFEREZ-VOUS A LA Q.1
SI LE PARTICIPANT MANGE MOINS/PLUS DU RIZ QU'AUPARAVANT:

Q.3 D'après vous qu'elle est la raison principale qui fait que vous/votre famille mangez plus/moins de riz aujourd'hui?

____

____...(21-22) ___ ___

AUCUNE RAISON SPECIALE...................75

NE SAIT PAS..............................77

REFUSE...................................88

PAS DE REPONSE...........................98

NON APPROUVE.............................00

INTERVIEWEUR: REFEREZ-VOUS A LA Q.1
SI LE PARTICIPANT MANGE MOINS/PLUS DES PATES QU'AUPARAVANT:

Q.4 D'après vous qu'elle est la raison principale qui fait que vous/votre famille mangez plus/moins de pâtes aujourd'hui?

____

____...(23-24) ___ ___

AUCUNE RAISON SPECIALE...................75

NE SAIT PAS..............................77

REFUSE...................................88

PAS DE REPONSE...........................98

NON APPROUVE.............................00

Q.5 Maintenant, nous aimerions vous posez quelques questions au sujet des aliments que vous (et votre famille) mangez en moyenne dans l'espace d'une semaine et cela, au repas principal du jour... mais tout d'abord j'ai besoin de savoir quand vous prenez votre repas principal du jour... Le prenez vous pour dîner le midi, ou le soir au souper?

LE MIDI.......................(25).......1

LE SOIR.................................2

TOUR A TOUR.............................3

NSP/REF/PDR.............................9

Q.6 Maintenant, si l' on pense au sept repas principaux dans une semaine... (REPETEZ) en moyenne, à combien de ces sept repas principaux, servez-vous (LISEZ CHACUN DES ITEMS)

		NUMERO	NSP/REF/PDR
6A quelque type de pommes de terre	(26)	____	9
6B quelque type de riz	(27)	____	9
6C quelques type de pâtes (alimentaires)	(28)	____	9

SI DES POMMES DE TERRE NE SON PAS SERVI PASSEZ A LA Q. 8

Q.7 Lorsque vous servez des pommes de terre au repas principal du jour... Quel type (genre) de pommes de terre servez vous le plus souvent... bouillie, au four, pileé, pommes de terre rissolees a l'Americaine, frites, gratinee, ou bien d'une autre manière (quel est cette manière)?

BOUILLIE............................(29)......1

AU FOUR.......................................2

PILEE...3

POMMES DE TERRE RISSOLEES A L'AMERICAINE...........4

GRATINEE......................................5

FRITES..6

AUTRE____________________________.................7

NSP/REF/PDR/NON APPR..........................9 ALLER A Q.8

Q.7a Pourquoi (LISEZ LE CHOIX DE LA Q. 7) sont elles servi le plus souvent?

____

____..(30-31)..___ ___

RIEN EN PARTICULIER..............................75

NSP/REFUSE.......................................99

NON APPR...00

SI LE RIZ N'EST PAS SERVI ALLEZ A LA Q.9

Q.8 Aux repas principaux où le riz est servi... quel genre de riz servez vous le plus souvent... le riz blanc... brun.... ou du riz en boîte ou du riz preparé ou n'importe laquelle autre Sorte?

BLANC.................................(32)...1

BRUN.......................................2

EN BOITE/ASSAISONNE........................3

AUTRE SORTE................................7

NSP/REF/PDR/NON APPRO......................9 ALLER A Q.9

Q.8A Pourquoi (LISEZ LE CHOIX DE LA Q.9) est-il servi le plus souvent?

____

____..(33-34)..___ ___

RIEN EN PARTICULIER.........................75

NSP/REFUSE..................................99

NON APPRO...................................00

Q.9 Maintenant, j'aimerais vous demandez au sujet du petit déjeuner chez vous... en géneral, combien de jours par semaines le petit déjeuner/déjeuner est il préparé?

INSCRIVEZ LE NUMERO.......(35)... ____

NSP/REFUSE/PDR...................9

S'IL N'Y A PAS DE PETIT DEJEUNER/DEJEUNER, PASSEZ A LA Q.10

Q.9A En pensant au (LISEZ NOMBRE DE LA Q.9) jours que le petit déjeuner/déjeuner et servi... en moyenne, combien de jour/fois est il servi avec pommes de terre?

FOIS SERVI................(36)...___

NSP/REF/PDR/NON APPR.............9

SI NE SON PAS SERVI ALLEZ A LA Q.10

Q.9B Quelles genres de pommes de terres sont servi le plus souvent au petit déjeuner a votre maisoneé?
(SONDEZ SI LA VARIETE EST MENTIONEE)

POMMES DE TERRE RISSOLEES
A L'AMERICAINE............(37)....1

FRITES............................2

AUTRE(SPECIFIEZ________________)..3

NSP/REF/PDR/NON APPRO.............9

Q.10 Maintenant, j'aimerais vous demandez au sujet des dîners (lunch) et des repas léger servi chez vous. En moyenne hebdomadaire (par semaine), combien de fois (jours) (préparer vous) servez vous le dîner et les repas leger?

INSCRIVEZ NUMERO..........(38-39) ____

NSP/REF/PDR......................9

S'IL N'Y A PAS DE REPAS LEGEE ALLEZ A LA Q.12

Q.10A En pensant aux (LISEZ NOMBRE DE LA Q.10) jours quand les dîners est sont preparé chez vous, combien de jours/fois en moyenne servez vous quelque types des pommes de terre?

NUMBER SERVED.............(40)...___

NSP/REF/PDR/NON APPRO............9

S'IL N'Y A PAS ALLEZ A LA Q.11

Q.10B Quelles types de pommes de terre son servi le plus souvent chez vous?

BOUILLIE..................(41)...1

AU FOUR..........................2

PILEE............................3

FRITES...........................4

AUTRE(SPECIFIEZ________________).5

NSP/REF/PDR/NON APPRO............9

Q.11 En pensant aux jours (LISEZ NOMBRE A LA Q.10A) où (les dîners) ou repas léger sont preparé chez vous, combien de fois y prépareriez vous du riz?

NOMBRE SERVIR.............(42)...___

NSP/REF/PDR......................9

SI LE RIZ N'EST PAS SERVI - ALLEZ A LA Q.12)

Q.11A Quand vous servez du riz au dîner, quel sortes de riz servez-vous le plus souvent?

BLANC...................(43)....1

BRUN............................2

FRIT............................3

PREPARE/EMBALLE.................4

AUTRE(SPECIFIEZ_________________)..5

NSP/REF/PDR/NON APPR.............9

Q.12 Ensuite, selon vous, lequel des produits suivants riz... pommes de terres... ou les pâtes... répond le mieux aux questions suivantes (LISEZ CHAQUE QUESTION EN Y AJOUTANT riz... pommes de terre... pâtes...? A LA FIN)

		POMMES DE TERRES	RIZ	PATES	COMB	PDR/REF
Q12A Lequel de ces produits a la meilleure valeur nutritive...	(44)	1	2	3	4	9
Q12B Lequel de ces produits aimez vous le mieux...	(45)	1	2	3	4	9
Q12C Lequel de ces produits à la meilleure valeur monétaire?	(46)	1	2	3	4	9
Q12D Lequel de ces produits préferez vous/ Votre famille?	(47)	1	2	3	4	9
Q12E Lequel de ces produits peut être servi de façon la plus diversifiée?	(48)	1	2	3	4	9
Q12F Lequel de ces produits accompagne mieux le poulet?	(49)	1	2	3	4	9
Q12G Lequel de ces produits accompagne mieux le boeuf?	(50)	1	2	3	4	9
Q12H Lequel de ces produits accompagne mieux le poisson?	(51)	1	2	3	4	9
Q12I Lequel de ces produits accompagne mieux le porc?	(52)	1	2	3	4	9
Q12J Lequel de ces produits semble aller le mieux avec le genre de repas que vous et votre famille mangé aujourd'hui?	(53)	1	2	3	4	9
Q12K Lequel de ces produits est le plus facile a préparer?	(54)	1	2	3	4	9
Q12L Lequel de ces produits est le plus bas en calories?	(55)	1	2	3	4	9
Q12M Lequel de ces produits semble être le plus approprié selon nos habitudes alimentaires d'aujourd'hui?	(56)	1	2	3	4	9

Maintenant, nous aimerions vous demandez quelques breves questions en ce qui concerne l'achat de ces produits.

Q.13 Dans l'ensemble, en tasses, combien de riz vous/votre famille mangez vous par semaine?

INSCRIVEZ LES TASSES...........(57-58)___ ___

NSP/REF/PDR..............................99

Q.14 Quand vous achetez des pommes de terre, quel genre d'emballage (sac) achetez vous le plus souvent (LISEZ CHACUN DES CHOIX).

le sac en papier de cinq livres...(59).....1

le sac en plastique de cinq livres.........2

le sac en papier de dix livres.............3

le sac en plastique de dix livres..........4

le sac en papier de vingt livres...........5

le sac en papier de cinquante livres.......6

individuelle (prêt pour le four) dans emballage en aluminium......................7

pommes de terre en (non enveloppée)........8

ou d'une autre façon (specifiez)__________.0

NSP/REF/PDR...............................9

(SI LE PARTICIPANT CULTIVE SES PROPRES POMMES DE TERRES POSEZ Q.15, ET PASSEZ A LA Q.25)

Q.14A Y a-t-il une raison particulière pour que vous achetez vos pommes de terre de la façon suivante? (LISEZ LES CHOIX DANS Q.15)

____

____(60-61) ___ ___

AUCUNE RAISON SPECIALE.....................22

NSP/REF/PDR...............................99

Q.14B D'une façon générale, diriez vous que vous êtes très satisfait(e)... plus ou moins satisfait(e)... plus au moins mécontent(e)... ou bien très mécontent(e) avec les emballages de pommes de terre disponible au Nouveau Brunswick?

TRES SATISFAIT(E)................(62)...........1 ALLEZ
A
PLUS OU MOINS SATISFAIT(E)......................2 Q.15

NSP/REF/PDR.....................................9

PLUS OU MOIN MECONTENT(E).......................3

TRES MECONTENT(E)...............................4

Q.14C Pourquoi (pour quelle raison) êtes vous mécontente avec l'emballage des pommes de terre disponible au Nouveau Brunswick?

____

____(63-64) ___ ___

NSP...77

REF/PDR/NON APPRO...............................99

Q.15 Dans l'ensemble, dans une semaine normale, combien de livres de pommes de terre mangez vous (vous et votre famille)?

INSCRIVEZ LE NOMBRE DE LIVRES..(65-66)___ ___

NSP/REF/PDR.............................99

Q. 16 Quand vous achetez des pommes de terre, y a-t-il une variété ou un type (genre) de pommes de terre que vous achetez plus que d'autres, comme par exemple les rondes blances, les russets, les rouges ou une autre varieté?

____(67-68) ___ ___

AUCUNE VARIETE PARTICULIERE...............75
ALLEZ
A
NSP/PDR/REF.............................99 Q.17

Q.16A Y a-t-il une raison particulière qui vous porte à acheter plus de pommes de terre (MENTIONNEZ DANS LA Q.)?

____(69-70) ___ ___

AUCUNE RAISON PARTICULIERE................75

NSP/PDR/REF/NON APPRO.....................99

Q. 17 Quand vous achetez vos pommes de terres y a-t-il une marque particulière que vous achetez plus que d'autre? (SI OUI, LAQUELLE?)

____(71-72) ___ ___

AUCUNE MARQUE PARTICULIERE................75

ALLEZ A Q.18

NSP/PDR/REF............................99

Q.17A Qui est ce qui vous porte à acheter cette marque plutôt que d'autre?

____(73-74) ___ ___

AUCUNE RAISON PARTICULIERE................75

NSP/PDR/REF/NON APPRO.....................99

Q.18 Quand vous achetez des pommes de terre, êtes vous plus porteé à acheter des pommes de terre laveé ou non laveé?

LAVEE.........................(75)........1

NON LAVEE.................................2

L'UNE OU L'AUTRE SANS DIFFERENCE..........3

NSP.......................................7

ALLER A Q.19

REF/PDR...................................9

Q.18A Pouquoi achetez vous plus pommes de terre (RESPONSE Q.18) ?

____

____(76-77)...___ ___

AUCUNE INDIQUEE...........................75

NSP/REF/NON APPRO/PDR.....................99

CARTE 2 (1-3)___ ___ ___

Maintenant, nous aimerions avoir vos impressions d'une façon générale, sur les pommes de terre disponible aux consommateurs dans cette province...

Q.19 D'une façon générale, diriez vous que vous êtes très satisfait(e)... plus ou moins satisfait(e)... plus au moins mécontent(e)... ou bien très mécontent(e) avec la grandeur et forme actuelle de pommes de terres qui sont disponible à l'achat?

TRES SATISFAIT(E)................(4)...........1 ALLEZ A Q.20

PLUS OU MOINS SATISFAIT(E)........................2

NSP/REF/PDR...9

PLUS OU MOIN MECONTENT(E)........................3

TRES MECONTENT(E)..................................4

Q.19A Pourquoi êtes vous mécontente avec la grandeur et forme des pommes de terre qui vous sont disponible?

____

____(5-6).. ___ ___

NE SAIT PAS...77

REF/PDR/ NON APPRO................................99

Q.20 D'une façon générale, diriez vous que vous êtes très satisfait(e)... plus ou moins satisfait(e)... plus au moins mécontent(e)... ou bien très mécontent(e) avec le prix d'achat des pommes de terres sur le marché du Nouveau Brunswick?

TRES SATISFAIT(E)................(7)............1 ALLEZ A Q.21

PLUS OU MOINS SATISFAIT(E)........................2

NSP/REF/PDR...9

PLUS OU MOIN MECONTENT(E)........................3

TRES MECONTENT(E)..................................4

Q.20A Pourquoi êtes-vous mécontente avec le prix d'achat des pommes de terres sur le marché du Nouveau Brunswick?

____

____(8-9).. ___ ___

NE SAIT PAS...77

REF/PDR/NON APPRO.................................99

Q.21 D'une façon générale, diriez vous que vous êtes très satisfait(e)... plus ou moins satisfait(e)... plus au moins mécontent(e)... ou bien très mécontent(e) avec le qualité en générale des pommes de terres qui vous sont disponible a l'achat?

TRES SATISFAIT(E)..................(10)...........1 ALLEZ A

PLUS OU MOINS SATISFAIT(E)........................2 Q.22

NSP/REF/PDR.......................................9

PLUS OU MOIN MECONTENT(E)........................3

TRES MECONTENT(E).................................4

Q.21A Pourquoi êtes-vous mécontente avec le qualité en générale des pommes de terres qui vous sont disponible a l'achat?

____

____(11-12) ___ ___

NE SAIT PAS......................................77

REF/PDR/NON APPRO................................99

Q.22 Quand vous achetez des pommes de terre pour votre maisonneé, quelles pommes de terre achetez vous le plus souvent, les pommes de terre du Nouveau Brunswick, les pommes de terre de l'île du Prince Edouard.. ou bien des pommes de terre d'une autre province ou des ETATS - UNIS?

POMMES DE TERRE DU NOUVEAU BRUNSWICK.....(13).....1

POMMES DE TERRE DE L'ILE DU PRINCE EDOUARD........2

D'AUTRE REGION (SPECIFIEZ)__________________).....3

COMBINE...4

NSP...7 ALLEZ A

PDR/REF...9 Q.23

Q.22A Y a-t-il une raison particulière qui vous porte à acheter (LISEZ LA REPONSE DE LA Q.22) plus que n'importe laquelle des autre types (genres) disponibles?

____

____(14-15)..___ ___

AUCUNE RAISON SPECIALE...........................75

NSP..77

PDR/REF/NON APPRO................................99

Maintenant, nous aimerions que vous fassiez une comparaison entre les pommes de terre produite au Nouveau Brunswick et celle produite dans l'île du Prince Edouard. Les quelles (LIREZ CHACUNE DES QUESTIONS) celles du Nouveau Brunswick ou celles de l'île du Prince Edouard?

		NB	IPE	PARIEL/ MEME	PDR/REF NSP
Q.23A les quelles ont la meilleure apparence?	(16)	1	2	3	9
Q.23B les quelles ont le meilleur emballage?	(17)	1	2	3	9
Q.23C les quelles ont la meilleure grosseur et forme?	(18)	1	2	3	9
Q.23D les quelles on le meilleur goût?	(19)	1	2	3	9
Q.23E les quelles ont le moins de meurtrissures?	(20)	1	2	3	9
Q.23F les quelles ont le meilleur prix?	(21)	1	2	3	9
Q.23G les quelles ont la meilleure réputation pour leur qualité?	(22)	1	2	3	9
Q.23H les quelles sont de meilleure qualité?	(23)	1	2	3	9
Q.23I les quelles preferez vous?	(24)	1	2	3	9

Q.23J Pourquoi preferez vous (Q.23I COMPARE A L'ALTERNATIVE)?

____

____(25-26).. ___ ___

NSP............................77

REF/PDR/NON APPRO.............99

Q.24 Nous aimerions terminer nos questions sur les pommes de terre, en vous demandant de regarder dans le future... dans cinq ans prévoyez vous acheter plus... moins ou la méme quantité de pommes de terre q'aujourd'hui?

AUGMENTATION.................(27)....1

DIMINUTION............................2

LA MEME...............................3

NSP...................................7 ALLEZ A Q.25

REF/PDR...............................9

Q.24A Pourquoi pensez-vous d'acheter plus/moins de pommes de terre d'ici cinq ans?

____

____(28-29)..___ ___

NSP.......................................77

REF/PDR/NON APPRO.........................99

En terminant notre sondage, nous aimerions vous demander quelques questions sur votre maisoneé?

SI LA PERSONNE EST CELIBATAIRE INSCRIVEZ UN ADULTE SEULEMENT ET DEMANDEZ LES QUESTION APPROPRIEES.

Q.25 Dans ensemble, combien de personnes vivent au foyer qui sont âgés de 18 ans et plus?

ENTER NUMBER.....................(30-31)..___ ___

REF/NA/DK.................................99

Q.26 Dans ensemble, combien d'enfants vivent au foyer entre l'âge de 12 et 17 ans?

ENTER NUMBER.....................(32-33)..___ ___

REF/NA/DK.................................99

Q.27 Dans ensemble, combien d'enfants vivent au foyer qui sont âgés d'onze ans ou moins?

ENTER NUMBER.....................(34-35)..___ ___

REF/NA/DK.................................99

Q.28 En quelle année êtes vous né(e)?................(36-37) 19 ___ ___

N. S. P..77

REF..88

N.A..98

Q. 29 Quelle est votre langue maternelle... la première langue que vous avez d'abord apprise à parler?

ANGLAIS............................(38)............1

FRANCAIS...2

AUTRE..4

N.S.P..7

REF..8

N.A..9

BILINGUE...3

Q.30 En quelle langue parlez vous le plus souvent chez vous... Français, Anglais ou autre?

ANGLAIS............................(39).......1

FRANCAIS..2

TOUJOURS BILINGUE...............................3

AUTRE ______________________________................4

NSP/REF/PDR.....................................9

Q.31 Etes vous présentement marié(e)..veuf(veuve)..divorcé(e) séparé(e)...célibataire ou autre?

MARIE(E)...........................(40)...........1

DIVORCE(E)-SEPARE(E).................................3

CELIBATAIRE-VEUF(VEUVE)..............................4

NSP/REF/NA...7

S'IL SAGIT D'UN ADULTE SEULEMENT, DEMANDEZ DE QUEL GENRE, SI ILS SONT DEUX DEMANDEZ LES DEUX QUESTIONS.

Q.32 Le chef de famille est-elle présentement:

au travail..........................(41)...1

sans travail................................2

incapacite..................................3

retrait.....................................4

etudiant....................................5 ALLER A Q.33

a la maison.................................6

AUTRE ______________________ 7

NSP/REF/PDR/NON APPRO.......................9

Q.32A Quelle est votre/son occupation habituelle, c'est à dire quel genre de travail faites vous/fait-elle?
(INSCRIVEZ LES MOTS EXACT DES PARTICIPANTS):

(PROBE: Pouriez-vous me dire en quoi consiste son travail?

____

____ (42-43) ___ ___

NSP..77

REF..88

NON APPRO..................................98

PDR..99

Q.33 Le chef de famille est-il présentement:

au travail..........................(44)...1

sans travail................................2

incapacite..................................3

retrait.....................................4

etudiant....................................5 ALLER A Q.34

a la maison.................................6

AUTRE ______________________ 7

NSP/REF/PDR/NON APPRO.......................9

Q.33A Quelle est votre/son occupation habituelle, c'est à dire quel de travail faites vous/fait-il?
(INSCRIVEZ LES MOTS EXACT DES PARTICIPANTS):

(PROBE: Pourez-vous me dire en que cela travail consiste?

____

____ (45-46) ___ ___

NSP	77
REF	88
NON APPRO	98
PDR	99

Q.34 Quel est la derniere année que vous avez complétée à l'école?

N'A PAS COMPLETE LE DIPOLME SECONDAIRE (47-48)	1
ECOLE SECONDAIRE COMPLETEE (GRADE 12)	2
ECOLE DE METIERS OU AUTRE ETUDE POST-SECONDAIRE NON UNIVERSITAIRE	3
FORMATION UNIVERSITAIRE - SANS DEGRE	4
DEGRE UNIVERSITAIRE	5
EDUCATION POST UNIVERSITAIRE OU PLUS	6
N.S.P	7
REF	8
N.A	9

Q.35 En vous référant à votre revenu familial total de 1986, c'est-à-dire vos revenus de toutes sources et avant les impôts, votre revenue familial total en 1986:

A. était-il supérieur à 15,000.00$?

OUI......................................(49-50)..12 Aller à B

NON..11 STOP

B. Votre revenu familial total en 1986 était-il supérieur à 20,000.00$?

OUI..14 Aller à C

NON..13 STOP

C. Votre revenu familial total en 1986 était-il supérieur à 25,000.00$?

OUI..16 Aller à D

NON..15 STOP

D. Votre revenu familial total en 1986 était-il supérieur à 30,000.00$?

OUI..18

STOP

NON..17

N.S.P..77

REF..88

N.A..98

INSCRIRE LES DONNEES SUIVANTES:

Q.36 Le sexe du répondant

FEMININ.....................................(51)..1

MASCULIN...2

Q.37 La durée approximative de l'entrevue?................(52-53) ___ ___

S'ASSURER QUE LE QUESTIONNAIRE EST COMPLET...MERCI

A REPORT ON THE
NEW BRUNSWICK POTATO INDUSTRY
AND
THE TABLESTOCK MARKET

REPORT RECOMMENDATIONS

PREPARED FOR:
NEW BRUNSWICK DEPARTMENT OF AGRICULTURE

PREPARED BY:
BASELINE MARKET RESEARCH LTD.
FREDERICTON, N.B.

JULY, 1987

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REPORT ON THE NEW BRUNSWICK POTATO INDUSTRY
AND THE TABLESTOCK MARKET
REPORT RECOMMENDATIONS

The information presented in the report for this project summarizes the objective material developed through the use of appropriate research methodology. The research recommendations, developed at the request of the Steering Committee, build on that objective material and add the element of the researcher's subjective interpretation of that material, based on his/her experiences.

At BMR research recommendations are usually presented under separate cover to distinguish between the objective and subjective nature of our work. The following material summarizes the recommendations BMR suggests to improve the overall condition of the tablestock portion of the New Brunswick potato industry.

1) A consistent theme throughout the research suggests that the NB potato does not have a positive image in the marketplace. Growers, shippers and consumers all have some doubt about the overall quality of the product, while wholesalers and retailers are fairly strident in their belief that the NB grown potatoes are of inferior quality. These views suggest the need for improvement in two areas:

..concerted efforts should be made to improve the overall quality of the product. This should include inspection of all potatoes produced for the NB market. Additionally, a higher percentage of the potatoes offered to the NB consumers should be either washed or brushed.

..if the quality of the product can be maintained at a consistent level we strongly recommend the implementation of a total promotional campaign designed to upgrade the image of the NB potato. We also suggest that NB become involved in a promotional campaign developed in conjunction with related organizations in other provinces. This campaign would focus on promoting innovative uses of the generic product, potatoes. An inter-provincial approach would provide greater resources for the development of in-store information and perhaps mail-outs, coupons, recipe booklets or other material. These could then be used to assist in the promotion of NB potatoes.

2) The government or the industry should undertake a concerted effort to improve relations between NB

suppliers and wholesalers and retailers within the province. Such an effort might include the development of a group of suppliers working together to assure the availability of a consistent supply and quality to one or more wholesalers. This might be a commonly branded product. The key rests with the need to meet the demands of the marketplace. If the industry continues to ignore the needs and opinions of wholesalers and retailers, it seems only a matter of time before greater market shares are lost to PEI.

3) While many growers in this province favour the establishment of a national potato agency, the resistance to such a concept by shippers is not unrealistic, given the present US attitudes and protectionist policies. Based on the information from this study, we strongly recommend that a more directed effort be undertaken by those involved with the New Brunswick potato industry to maintain current and assure future access to the US market, especially given the potential establishment of a national potato agency. Realistically, the New Brunswick market cannot absorb the current volumes of sales to the US. As well, the New Brunswick producer does not have significant opportunities in major Canadian markets

because of the prominence of the PEI, Ontario and Quebec product, and because NB producers have been losing market share in these areas for several years. If the borders are closed, there can only be serious, if not disastrous economic repercussions in this province. Lobbying the state and federal governments in the US should be one of the highest priorities of those involved with this industry. This lobbying endeavor should also include efforts to reduce the difficulties experienced today of bringing NB potatoes into US markets.

4) The interviews with both growers and shippers suggest the need for the government to establish a system based on fairness. Apparently, the problem of government funded wash lines and X-ray equipment, as well as storage facilities has created the perception of unfair competition. Several noted that they could not fairly compete with another grower/shipper if a significant portion of their competitors' capital costs were funded through grants. Those involved at the government level should be conscious of the need to be perceived as fair as well as to be fair in all business dealings. This concept of fairness should also be extended to the Potato Agency in its collection

of shippers fees: iffees are to be charged, then all fees should be collected.

5) If the industry is going to advance in a progressive manner, it will have to involve each distinct sector of the industry. In order for this to happen, some effort must be devoted to building a better sense of trust between these sectors. Ideally, the forum for this trust building would be within the Potato Agency. It seems that this agency should devote more energy to building better communications and thus the potential for a more efficient industry. However, if this is not possible, we would suggest that the government become involved in setting up a task force on the industry. This should bring together growers, shippers, processors, wholesalers, retailers, and consumer representatives. We suggest that this task force act as an advisory group to the Minister of Agriculture and that no staff of the Agency or the federal or provincial government be members of this committee. One government person should, however, act as a committee staff person.

We suggest that departmental staff present briefs or positions to this committee for their comment or review, or that the Minister use this committee as a planning or sounding board for government policy. This committee could be the initiating force in improving communication within the industry (growers and shippers) and between the different sectors (including wholesalers, retailers and consumers).

6) The basic recommendation, and the one that would be endorsed by all growers, would suggest the need for a stable price for potatoes. However, we do not believe that price stabilization is possible at the present levels of production if the industry does not recapture some of its lost markets and maintain access to the US markets. Previous recommendations suggest an approach to rebuilding and restructuring. If the industry is to continue to involve about 455 producers, these actions are essential to stimulate the demand needed to maintain prices. However, as one grower indicated: "when the prices are good, they just plant more next year"...somehow, price management will have to incorporate a system of supply management if it is to be effective.

7) The consumer study has provided the basis for the recommended promotional plan. Further, we need to

point out that the provincial market is currently buying out of a sense of loyalty and price consciousness and is traditional and unimaginative in its use of potatoes. It is also likely that this market cannot be encouraged to consume a great deal more potatoes. Therefore, we suggest that the emphasis has to be placed on maintaining the current customer and regaining customers from PEI. This is going to require considerable effort by all parties involved in this industry.

These recommendations have been developed at the request of the Steering Committee; it is suggested that these might serve as starting point for departmental and agency discussions about future directions for the industry.